2024 GLOBAL TRAVELLER RESEARCH PROGRAM

SOUTH KOREA DEEP DIVE REPORT

Bay of Fundy   *New Brunswick*

Canada

DESTINATION CANADA

CANADIAN TOURISM DATA
collective

TABLE OF CONTENTS

Alberta

South Korea GTRP – December 2024

STUDY OVERVIEW: SOUTH KOREA MARKET

The Global Traveller Research Program is an annual survey commissioned by Destination Canada and conducted by YouGov Canada. The study fielded online in Korean, with sample being sourced from a nationally established panel.

The target population are residents aged 18 years and older who have taken a long-haul pleasure trip, where they had stayed at least 4 nights with a minimum of 1 night in paid accommodations in the past 3 years, or plan to take such a trip in the next 2 years.

Highly Engaged Guest (HEG) Audience Definition: Four segments that have been identified by Destination Canada as having higher economic and responsible values that most benefit Canadian communities.

Timing of Fieldwork

November 19th – December 11th 2024

Geographical Definition for Qualified Trips

Outside of: East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan)

Sample Distribution

Sample distribution:	**National**
Highly Engaged Guest (HEG) Audience:	951
Other travellers:	560
Total sample size:	1511

- In 2023, DC switched research providers to YouGov Canada, with the project being migrated over to YouGov's proprietary panel.

Newfoundland and Labrador

SEGMENT DESCRIPTION SLIDES

Destination Canada categorizes travellers into seven key segments using a short series of questions called the **Traveller Segmentation Program typing tool**. Four segments have been identified by Destination Canada as having higher economic and responsible values that most benefit Canadian communities – these segments are referred to as Highly Engaged Guests and are Destination Canada's recommendation for all international leisure tourism targeting towards Canada. Throughout this report audience breakouts are included sometimes for Highly Engaged Guests (HEGs) as a whole and for individual segments that make up Highly Engaged Guests.

HIGHLY ENGAGED GUESTS

Outdoor Explorers
Base motivations

Adventure
New Connections
Accomplishment

Culture Seekers
Base motivations

Novel & Authentic
New Connections
Accomplishment

Refined Globetrotters
Base motivations

Novel & Authentic
Bonding
Escape & Relax

Purpose Driven Families
Base motivations

Novel & Authentic
Bonding
Traditions

OTHER TRAVELLER SEGMENTS

City Trippers
Base motivations

Escape & Relax
Bonding
Fun

Simplicity Lovers
Base motivations

Escape & Relax
Simplicity
Security

Fun & Sun Families
Base motivations

Escape & Relax
Bonding
Fun

To Learn More

If you'd like to learn more about Destination Canada's segments, and their motivations, explore detailed market profiles, training options, and segment identification tools at TourismDataCollective.ca/Segmentation

KEY INSIGHTS

KEY INSIGHTS

Canada's Market Potential & Competitive Destinations

- The immediate potential for Canada is 8.4M South Korean travellers

- The four HEG segments represent 71% of the immediate market potential:

    ✓ **Refined Globetrotters**, Canada's priority segment, represents the largest opportunity at 1.9M South Korean travellers

    ✓ **Outdoor Explorers** are the second largest segment at 1.8M, followed by **Culture Seekers** (1.6M) and **Purpose Driven Families** (460K)

- Among the competitive list of destinations, the US is the most visited destination with Canada ranking 8th, trailing behind Australia and several European countries

- However, consideration for Canada (28%) is just below Australia (34%), the US (33%) and Spain (29%). Among HEGs, the gap in consideration is even smaller with Canada a top destination (second only to Australia)

- While this suggests that Canada is a competitive destination, it's worth noting that these destinations (including Canada) are not top of mind among South Korean travellers. Four in ten (41%) cite Japan when asked on an unaided basis which destinations they are seriously considering, followed by Taiwan (22%). This is compared to just 1% for Canada

- South Korean travellers view Canada first and foremost as having beautiful natural scenery/landscapes. It has unique/natural wonders to discover and is a great place to see wildlife in its natural habitat. However, there is an opportunity to further educate them on what Canada has to offer. While Canada ranks 4th in overall knowledge, only one-quarter (27%) say they have at least very good knowledge of the destination and this has decreased year over year

- In addition to competing with other destinations for consideration, distance and cost are top factors that would discourage South Koreans from travelling to Canada. This is true among all segments, and distance is especially problematic among the **Refined Globetrotters**

KEY INSIGHTS

Key Drivers & Opportunities by Priority Segment

Refined Globetrotters

- Approximately three in ten (28%) **Refined Globetrotters** have ever visited Canada which is slightly higher than the average South Korean traveller. Like other segments, their Net Promoter Score (NPS) is positive (+12)

- Canada has carved out a relatively distinct persona (which is largely tied to nature) among **Refined Globetrotters.** Nature-related strengths include: *beautiful natural scenery and landscapes*, *great place to see wildlife in its natural habitat*, *has unique, natural wonders to discover, is a place where nature can be enjoyed in close proximity to cities and a place where I can enjoy the vastness of nature*. In addition, it is not only perceived as being a place South Korean travellers feel *safe visiting*, but also *environmentally friendly*, *a good place to live, has wide-open landscapes* and *has great outdoor and physical activities*

- While there is little white space in this market, strengthening perceptions of <u>key drivers</u> can help position Canada more effectively against competitors. There is potential to enhance consideration by bolstering communications that Canada *has great historical sites and experiences, has cities with a lot of great attractions and is a good value for the money*

KEY INSIGHTS

Fall Travel

- Seasonal potential is higher in the Fall (6.4M Total) vs. the Winter (4.2M)

- Canada is one of the top considerations for Fall travel among South Korean travellers and HEGs. However, Japan (and other countries in Asia) dominate unaided destination consideration. This suggests that even though these destinations are not part of the aided competitive set, they represent a significant threat to consideration of Canada as a destination

- Among those considering a Fall trip, ideal weather and a desire to see the Fall foliage are top motivators

- Being unable to take a holiday during these months remains the biggest barrier. Of note, motivation to leverage the Chusok holiday has decreased compared to last year

- Further, three in ten (29%) **Refined Globetrotters** express concern for travel prices during these months

Winter Travel

- Overall, Canada is viewed as distinctly as a Winter destination (57%) as it is a Fall destination (58%)

- Similar to Fall, Canada is not top of mind when South Koreans think of destinations where they would like to experience the Winter season. Among all segments, Canada is primarily competing with Japan

- Within the aided competitive set, at 25% Canada trails behind Australia (35%), Iceland (32%) and Switzerland (30%). Of note, is the stronger consideration for Winter travel to Canada among HEGs (28%)

- Ideal weather and availability are top motivators

- However, there is a larger number who cite weather as a barrier to visiting Canada during these months, and **Refined Globetrotters** over-index on this

KEY INSIGHTS

Recent Trip to Canada: Profile

- One-half (49%) of all South Koreans who travelled to Canada did so for leisure, and this was consistent vs. a year ago
- The vast majority (80%) of trips to Canada were in the 4–13 night range
- Six in ten travellers to Canada were accompanied by a spouse or partner, a 21 pt. increase over last year
- At 71%, travel agents continue to be widely used among South Korean travellers. And nearly two-thirds (64%) state at least part of their trip was part of an organized tour
- Trips to Canada differed from other destinations in the following ways:
  - At 19%, trips to Canada were more likely to have a business component compared to other destinations (9%)
  - Use of travel agents was more prevalent for Canada trips (71% vs. 59% for other destinations) and specifically in-person booking of both flights and accommodations was more popular
  - Travellers to Canada were more likely to travel with a spouse/partner or children under 18 compared to travellers to other destinations
  - Although most stays were in luxury or mid-priced hotels, 11% claim to have stayed in a guest ranch, farm or lodge compared to just 4% for other destinations

MARKET SIZING

MARKET SIZING – LONG-HAUL TRAVELLERS

Total Population 18+

44,644,000 (Total KR Population 18+)

42% Took a Long-Haul^ Pleasure Trip in the Past 3 Years

36% Plan To Take a Long-Haul Pleasure Trip In Next 2 Years

18,750,500 (Recent Long-Haul Travellers)

16,072,000 (Upcoming Long-Haul Travellers)

48.5% Incidence Rate

Total long-haul pleasure travel incidence (past 3 years/planned next 2 years)

21,652,500 (Total Long-haul Travellers)

^ Long-haul = outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan)
Note: Results are from 2023 YouGov Canada Omnibus Survey
Base: General population aged 18+ (n=987)

POTENTIAL MARKET SIZE FOR CANADA (NEXT 2 YEARS)

South Korea's overall target market and immediate potential have remained stable compared to last year, with 8.4M travellers definitely or very likely to visit Canada in the next two years.
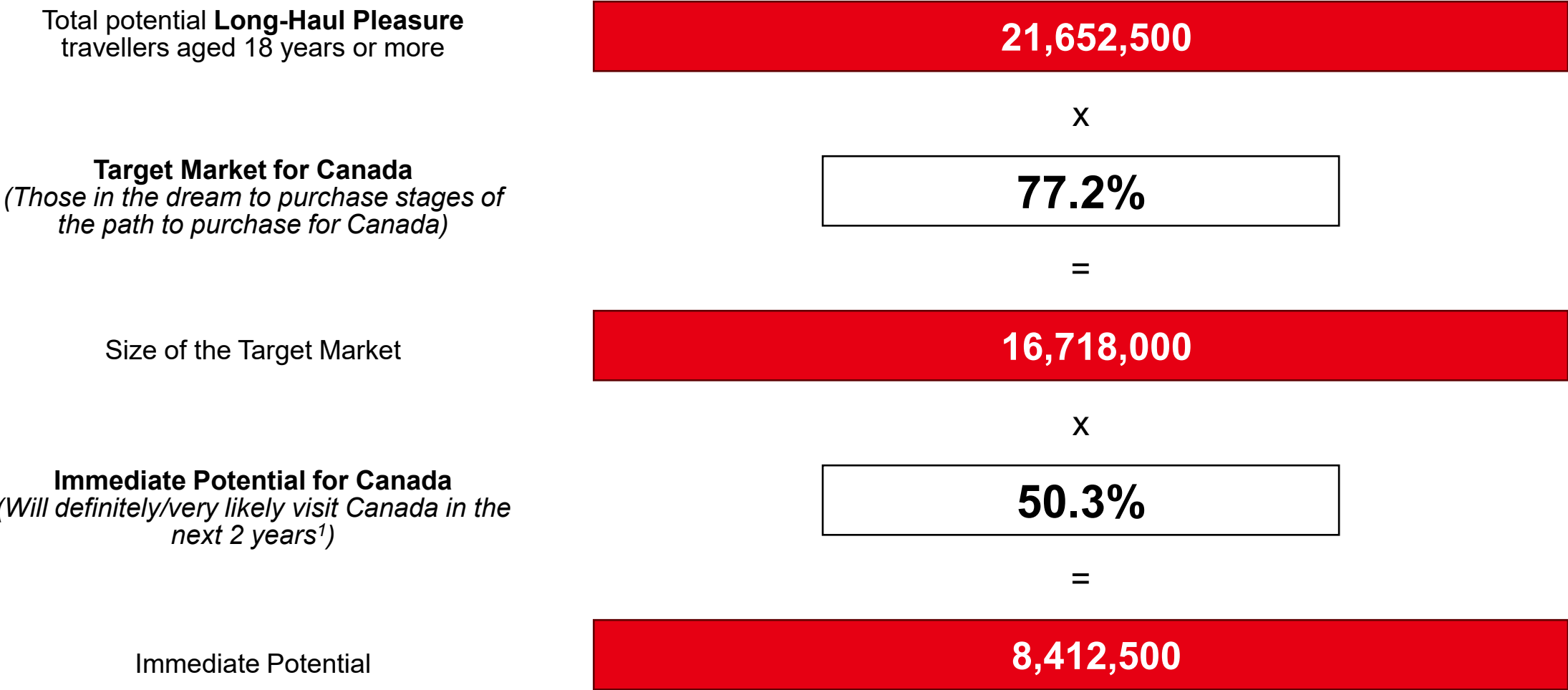
Total potential **Long-Haul Pleasure** travellers aged 18 years or more

21,652,500

x

Target Market for Canada
(Those in the dream to purchase stages of the path to purchase for Canada)

77.2%

=

Size of the Target Market

16,718,000

x

Immediate Potential for Canada
(Will definitely/very likely visit Canada in the next 2 years[1])

50.3%

=

Immediate Potential

8,412,500

[1] Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years) (n=1511); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=1157)
C1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip? (Select one for each)
E1. Realistically, how likely are you to take a holiday trip to Canada in the **next 2 years**? (Select one)

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

POTENTIAL MARKET SIZE FOR CANADA (NEXT 2 YEARS): BY SEGMENT

Among segments, Refined Globetrotters offer the largest immediate potential for Canada, with 1.9M travellers likely to visit in the next two years, followed by Outdoor Explorers at 1.8M. The Fall season has the bigger opportunity across all segments, compared to Winter.

	21,652,500 (Total Long-Haul Travellers)			
Total segment sizes **X**	3,951,500 Outdoor Explorers	3,605,000 Culture Seekers	4,627,000 Refined Globetrotters	1,349,000 Purpose Driven Families
Target Market for Canada *(Those in the dream to purchase stages of the path to purchase for Canada)* **=**	82.3%	81.6%	79.7%	75.6%
Size of the Target Market **X**	**3,253,000**	**2,942,000**	**3,687,000**	**1,020,000**
Immediate Potential for Canada *(Will definitely/very likely visit Canada in the next 2 years[1])* **=**	55.9%	53.8%	52.0%	63.7%
Immediate Potential **X**	**1,817,000**	**1,582,000**	**1,917,000**	**650,000**
Immediate Seasonal Potential *(Consideration for Canada in [SEASON] in next 2 years)* **=**	**Fall** 44.9% / **Winter** 27.9%	**Fall** 39.7% / **Winter** 33.8%	**Fall** 43.3% / **Winter** 32.6%	**Fall** 50.8%* / **Winter** 27.6%*
Immediate Seasonal Potential	**Fall** 815,000 / **Winter** 506,000	**Fall** 628,000 / **Winter** 535,000	**Fall** 830,500 / **Winter** 624,500	**Fall** 330,500 / **Winter** 179,500

[1] Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years): Outdoor Explorers (n=283); Culture Seekers (n=258); Refined Globetrotters (n=312); Purpose Driven Families (n=98)
Immediate potential for Canada = dream to purchase stages for P2P for Canada: Outdoor Explorers (n=232); Culture Seekers (n=210); Refined Globetrotters (n=246); Purpose Driven Families (n=74)
Immediate autumn potential for Canada: Outdoor Explorers (n=129); Culture Seekers (n=115); Refined Globetrotters (n=130); Purpose Driven Families (n=48*); Immediate winter potential for Canada: Outdoor Explorers (n=129); Culture Seekers (n=115); Refined Globetrotters (n=130); Purpose Driven Families (n=48*)
C1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip? (Select one for each)
E1. Realistically, how likely are you to take a holiday trip to Canada in the **next 2 years**? (Select one)
C7. For each of the following destinations, during which months would you consider taking long-haul trip <u>in the next two years</u>?
*Small base size, interpret with caution (n<50)

CANADA VS. COMPETITORS

PAST VISITATION

One in four South Korean travellers have visited Canada, ranking 8th among the competitive set. Recent visitation is higher among HEGs.

	Total South Korea			HEG Audience		
	Visited more than 3 years ago	Visited in the past 3 years	*Ever visit*			
United States	27%	15%	*42%*	29% +	19% +	*48%* +
France	26%	8%	*34%*	29% +	11% +	*40%* +
Italy	24%	8%	*32%*	26% +	10% +	*36%* +
Australia	20%	10%	*30%*	22% +	12% +	*34%* +
United Kingdom	20%	8%	*28%*	22% +	11% +	*33%* +
Germany	21%	7%	*27%*	24% +	8% +	*32%* +
Switzerland	19%	6%	*25%*	21% +	8% +	*29%* +
Canada	17%	7%	*24%*	21% +	8% +	*29%* +
Spain	15%	7%	*23%*	19% +	9% +	*28%* +
Portugal	9%	4%	*13%*	11% +	5% +	*16%* +
Iceland	4%		*6%*	6% +		*8%* +
Other	21%	25%	*46%*	23% +	24%	*47%*
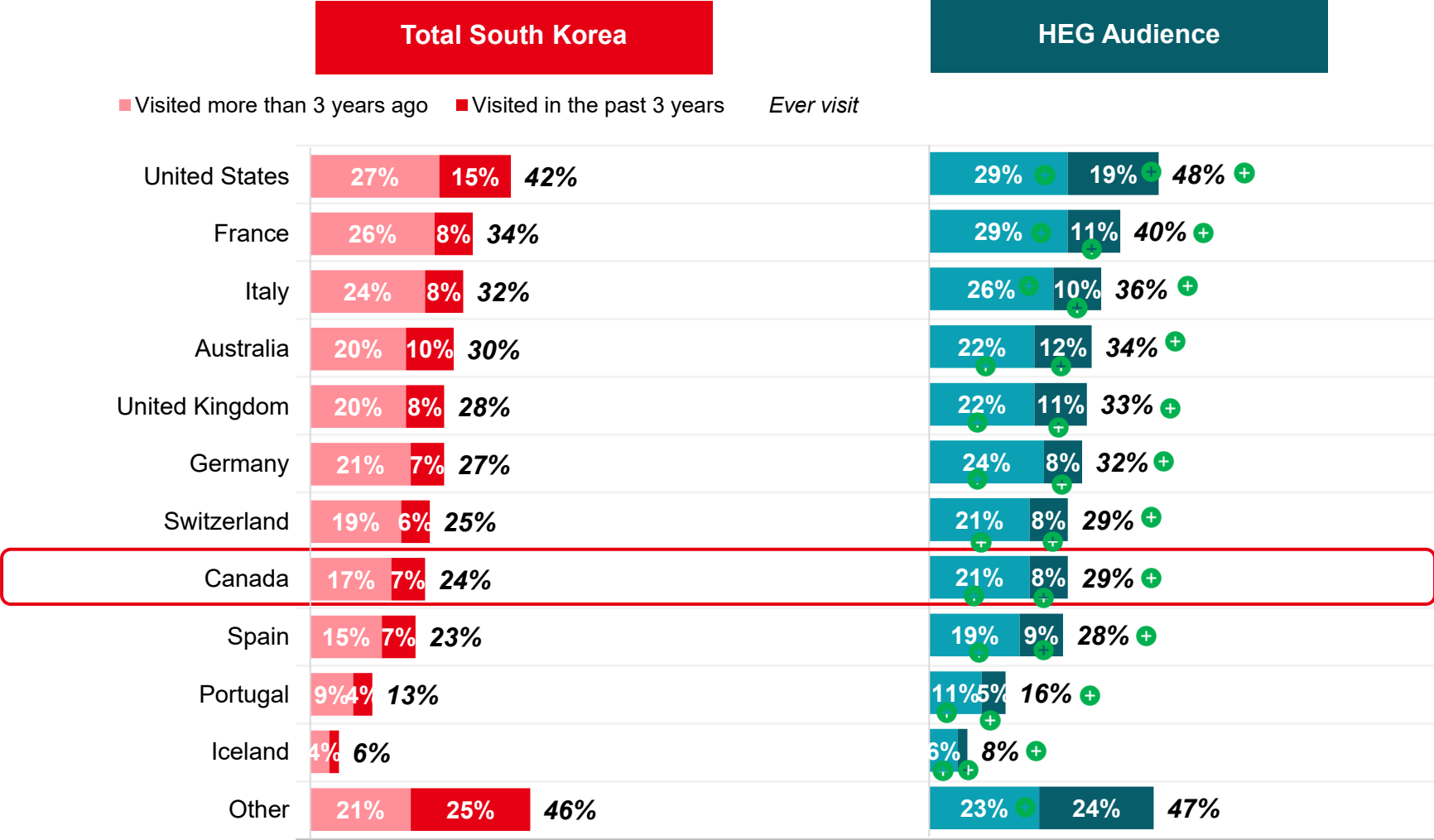
28% of **Refined Globetrotters** ever visited Canada

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1511); HEG (n=951)
B5. Which of the following countries or regions have you visited while on a holiday trip **outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan)** which was 1 or more nights long?

+ / − = significantly higher/lower result (HEG vs. 2024 Total)

NUMBER OF VISITS EVER & TIME OF YEAR VISITED CANADA

Summer and Fall are the main seasons of travel for total South Korean travellers and HEGs.

■ Total South Korea   ■ HEG Audience

- 1 time: 49% / 48%
- 2 times: 29% / 31%
- 3+ times: 23% / 22%

■ Total South Korea   ■ HEG Audience

Month	Total South Korea	HEG Audience
December	12%	12%
January	7%	6%
February	10%	8%
March	11%	11%
April	11%	11%
May	14%	15%
June	13%	13%
July	19%	18%
August	17%	15%
September	15%	14%
October	21%	20%
November	11%	10%
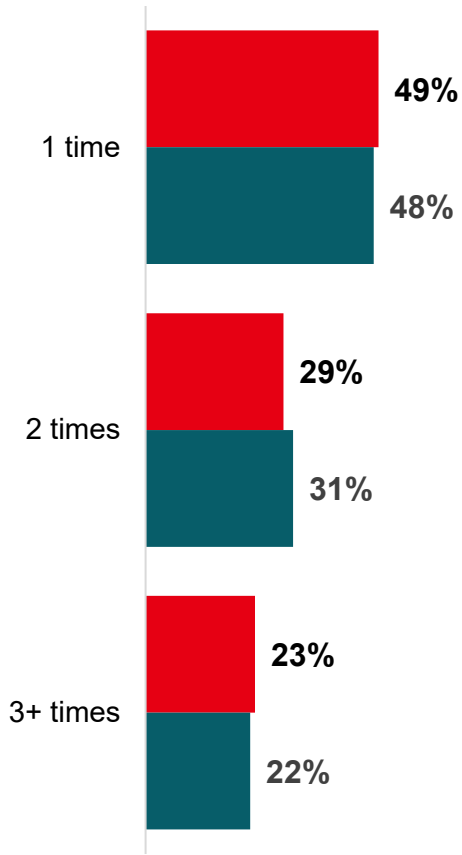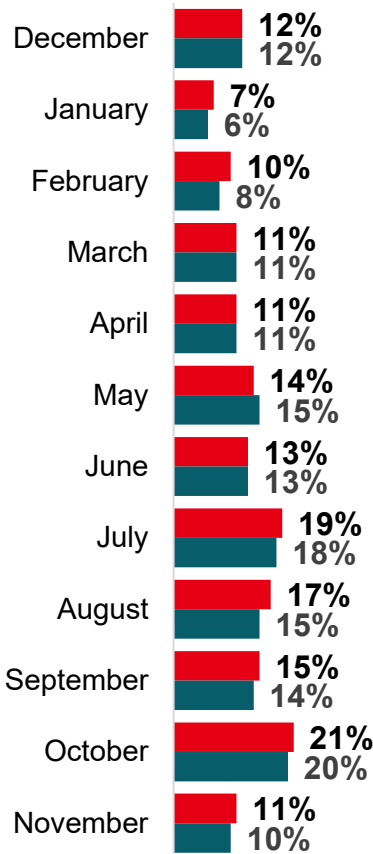
	Total Travellers	Total HEG Travellers
Winter	23%	23%
Spring	31%	32%
Summer	38%	37%
Fall	39%	37%

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Visited Canada (n=366); HEG (n=277)
F19a. Approximately, how many times have you ever been to Canada?
F20. What time of year have you ever visited Canada? Select all that apply.

● / ● = significantly higher/lower result (HEG vs. 2024 Total)

CANADA NET PROMOTER SCORE (NPS): BY SEGMENT

DESTINATION CANADA

Canada ranks second in terms of NPS against the competitive set, behind Switzerland. Among the segments, Culture Seekers, followed by Outdoor Explorers score Canada the highest.

NPS

	Total South Korea	Outdoor Explorers	Culture Seekers	Refined Globetrotters	Purpose Driven Families
	+15	+16	+19	+12	+10

■ Promoters (9-10)

■ Passives (7-8)

■ Detractors (0-6)

	Total South Korea	Outdoor Explorers	Culture Seekers	Refined Globetrotters	Purpose Driven Families
Promoters	35%	34%	36%	33%	36%
Passives	45%	49%	47%	45%	38%
Detractors	20%	18%	17%	22%	26%
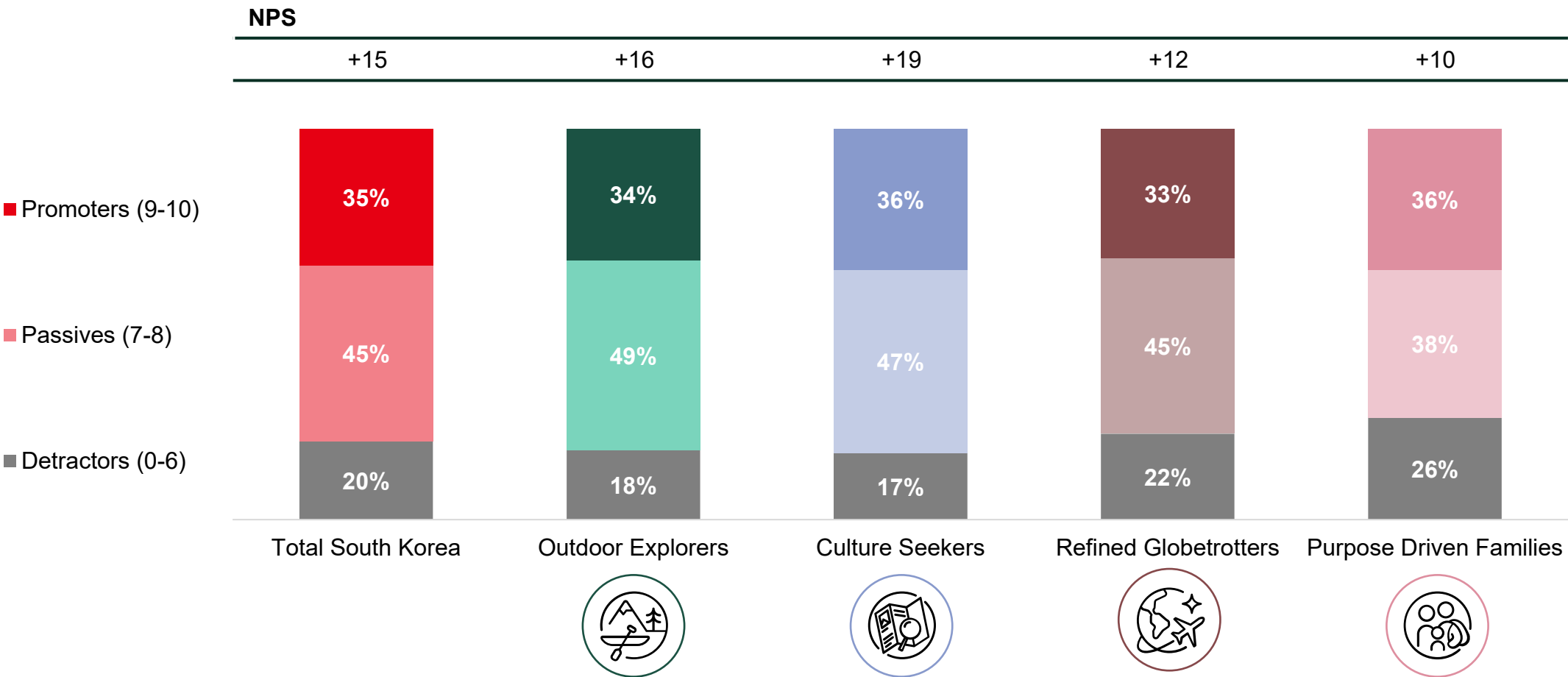
Net Promoter Score (NPS): This measure has an 11pt scale (0-10). The score is calculated by subtracting Detractors (0-6 rating) from Promoters (9-10 rating).
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Visited Canada: Total (n=366); Outdoor Explorers (n=90); Culture Seekers (n=67); Refined Globetrotters (n=86); Purpose Driven Families (n=34*)
C8. How likely are you to recommend each of the following holiday destinations to a friend, family member or colleague?
*Small base size, interpret with caution (n<50)

UNAIDED DESTINATION CONSIDERATION (NEXT 2 YEARS)

On an unaided basis, Japan leads for destinations most top of mind for trips in the next two years. In fact, top mentions are all for East Asian countries. Canada receives low mentions overall, and mentions have decreased compared to last year.

Top Destination Brands[1]

Japan	**41%**
Taiwan	**22%**
Hong Kong	**17%**
China	**11%** ↑
Vietnam	**8%**
Macau	**7%** ↑
Thailand	**6%**
Singapore	**4%**
South Korea	**4%**
Philippines	**2%**
Australia	**2%**
Tokyo	**2%**
Osaka	**2%**
United States	**2%**

Canada receives:
Total: 1% mentions ↓

Top Destinations[2]

Japan	**44%**
China	**29%** ↑
Taiwan	**22%**
Vietnam	**8%**
Thailand	**7%**
South Korea	**5%**
Singapore	**4%**
Philippines	**2%**
Australia	**2%**
United States	**2%**

Canada receives:
Total: 1% mentions ↓
Refined Globetrotters: 1% mentions
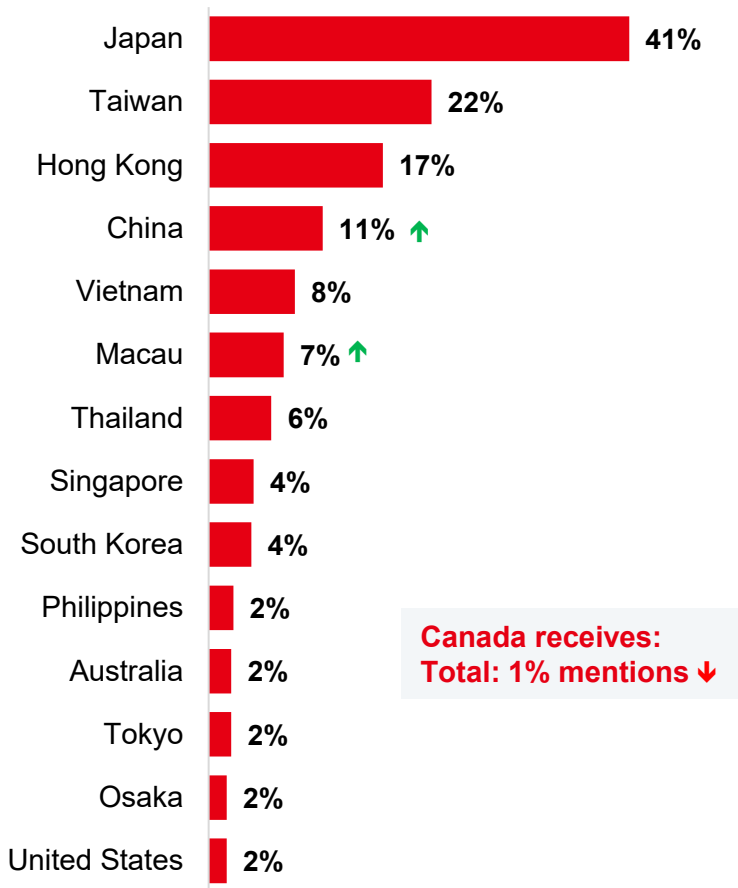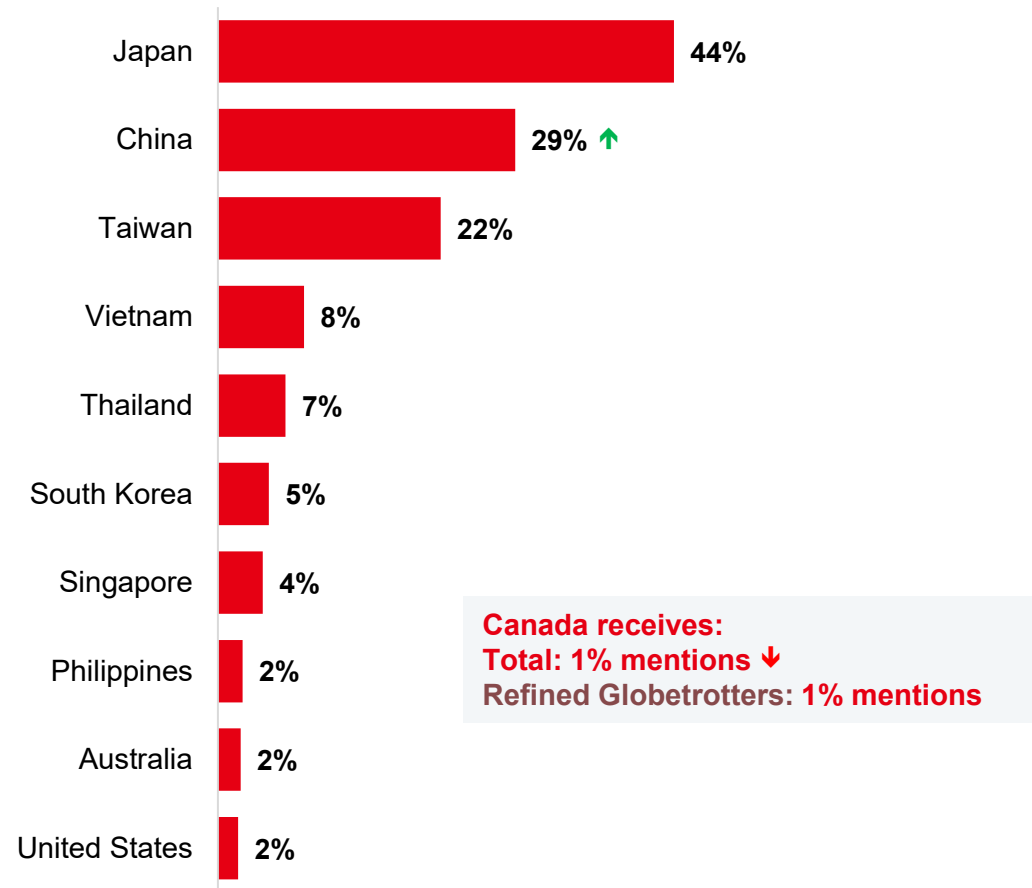
[1] Responses as mentioned by respondents (e.g., percentage who said "Canada" specifically).
[2] Roll-up of brand mentions by country (e.g., percentage who said "Canada" or any destination in Canada).
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1511)
B1. You mentioned that you are likely to take long-haul holiday trip in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

IMPRESSIONS OF CANADA AS A HOLIDAY DESTINATION

Canada is mainly associated with nature, as it has the highest scores for having beautiful natural scenery and landscapes, having unique, natural wonders to discover, and being a great place to see wildlife in its natural habitat.

■ Total South Korea ■ HEG Audience

Statement	Total South Korea	HEG Audience
Has beautiful natural scenery and landscapes	63%	61%
Has unique, natural wonders to discover	56%	55%
Is a great place to see wildlife in its natural habitat	56%	56%
Is a place where I can get away from the stresses of everyday life	53%	51%
Is a destination where I can explore new things and places	52%	49% ⊖
Is a place I would be proud to tell people I have visited	51%	49%
Is a place where I can experience things that I can't experience at home	51%	51%
Is an environmentally-friendly travel destination	51%	51%
Has great outdoor and physical activities	50% ↑	49%
Is a place I want to visit with my family	49%	47% ⊖
Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)	46% ↓	48%
Is a place I want to visit with friends	40%	41%
Is a great place for holidays that avoid surprises	36%	36%
Its cities have a great atmosphere	36%	38%
Its cities have a lot of great attractions	36% ↓	37%
Is a place trending as a must-visit spot	33%	35%
Has a culture that I would want to experience	30%	34% ⊕
Is a place where I can explore several different cities or regions in one trip	30%	32%
Is a socially responsible travel destination	30%	33% ⊕
Has great historical or heritage sites and experiences	26%	28% ⊕
Is a great place for shopping and browsing through stores	26%	30% ⊕
Has great dining and food experiences	24%	26% ⊕
Has transport options that make it easy for me to get to from where I live	23%	26% ⊕
Has a great arts, festivals, and music scene	22% ↑	25% ⊕
Offers good value for money	17% ↓	20% ⊕

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

⊕ / ⊖ = significantly higher/lower result (HEG vs. 2024 Total)

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1511); HEG (n=951)
C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.

South Korea GTRP – December 2024

19

CONSIDERATION FUNNELS: TOTAL SOUTH KOREA

Familiar
Dream to Purchase
Consider to Purchase
Actively Planning
Committed

Almost three in ten (28%) South Korean travellers are seriously considering a trip to Canada in the next two years, behind Australia, the United States, and Spain.

	Canada	United States	France	Australia	United Kingdom
Familiar	80%	88%	87%	84%	83%
Dream to Purchase	77%	83%	76%	80%	71%
Consider to Purchase	28%	33%	24%	34%	22%
Actively Planning	10%	11%	9%	13%	8%
Committed	1%	1%	1%	1%	1%

Canada: 96%, 36%, 36%, 10%
United States: 94%, 40%, 33%, 9%
France: 87%, 32%, 38%, 11%
Australia: 95%, 43%, 38%, 8%
United Kingdom: 86%, 31%, 36%, 13%

	Switzerland	Italy	Spain	Germany	Iceland	Portugal
Familiar	83%	83%	79%	78%	65%	64%
Dream to Purchase	80%	80%	79%	68%	65%	57%
Consider to Purchase	24%	26%	29%	18%	12%	16%
Actively Planning	9%	10%	9%	6%	5%	6%
Committed	1%	1%	1%	1%	0%	1%

Switzerland: 96%, 30%, 38%, 11%
Italy: 96%, 33%, 38%, 10%
Spain: 100%, 37%, 31%, 11%
Germany: 87%, 26%, 33%, 17%
Iceland: 100%, 18%, 42%, 0%
Portugal: 89%, 28%, 38%, 17%

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Evaluated [DESTINATION]
See notes for question wording and funnel definitions

CONSIDERATION FUNNELS: AMONG HEG TRAVELLERS

HEGs are more likely to seriously consider a trip to Canada in the next two years, tied with the US but still behind Australia.

Legend (funnel stages):
- Familiar
- Dream to Purchase
- Consider to Purchase
- Actively Planning
- Committed

Canada
- Familiar: 85%
- Dream to Purchase: 81% (95%)
- Consider to Purchase: 36% (44%)
- Actively Planning: 13% (36%)
- Committed: 2% (15%)

United States
- Familiar: 90%
- Dream to Purchase: 83% (92%)
- Consider to Purchase: 36% (43%)
- Actively Planning: 14% (39%)
- Committed: 1% (7%)

France
- Familiar: 92%
- Dream to Purchase: 80% (87%)
- Consider to Purchase: 29% (36%)
- Actively Planning: 11% (38%)
- Committed: 1% (9%)

Australia
- Familiar: 90%
- Dream to Purchase: 86% (96%)
- Consider to Purchase: 42% (49%)
- Actively Planning: 16% (38%)
- Committed: 2% (13%)

United Kingdom
- Familiar: 87%
- Dream to Purchase: 75% (86%)
- Consider to Purchase: 28% (37%)
- Actively Planning: 11% (39%)
- Committed: 1% (9%)

Switzerland
- Familiar: 87%
- Dream to Purchase: 84% (97%)
- Consider to Purchase: 28% (33%)
- Actively Planning: 11% (39%)
- Committed: 1% (9%)

Italy
- Familiar: 88%
- Dream to Purchase: 84% (95%)
- Consider to Purchase: 32% (38%)
- Actively Planning: 13% (41%)
- Committed: 1% (8%)

Spain
- Familiar: 85%
- Dream to Purchase: 82% (96%)
- Consider to Purchase: 35% (43%)
- Actively Planning: 11% (31%)
- Committed: 1% (9%)

Germany
- Familiar: 84%
- Dream to Purchase: 74% (88%)
- Consider to Purchase: 23% (31%)
- Actively Planning: 9% (39%)
- Committed: 1% (11%)

Iceland
- Familiar: 69%
- Dream to Purchase: 69% (100%)
- Consider to Purchase: 17% (25%)
- Actively Planning: 7% (41%)
- Committed: 1% (14%)

Portugal
- Familiar: 68%
- Dream to Purchase: 61% (90%)
- Consider to Purchase: 22% (36%)
- Actively Planning: 8% (36%)
- Committed: 2% (25%)

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul pleasure travellers (past 3 years or next 2 years), HEG, Evaluated [DESTINATION]
See notes for question wording and funnel definitions

South Korea GTRP – December 2024   21

LEVEL OF KNOWLEDGE OF HOLIDAY OPPORTUNITIES

Canada ranks 4th overall in knowledge of holiday opportunities among both South Korean travellers and HEGs. Level of knowledge about Canada and the majority of destinations has decreased compared to last year.

	Total South Korea		HEG Audience	

■ Very good ■ Excellent *Very good/Excellent*

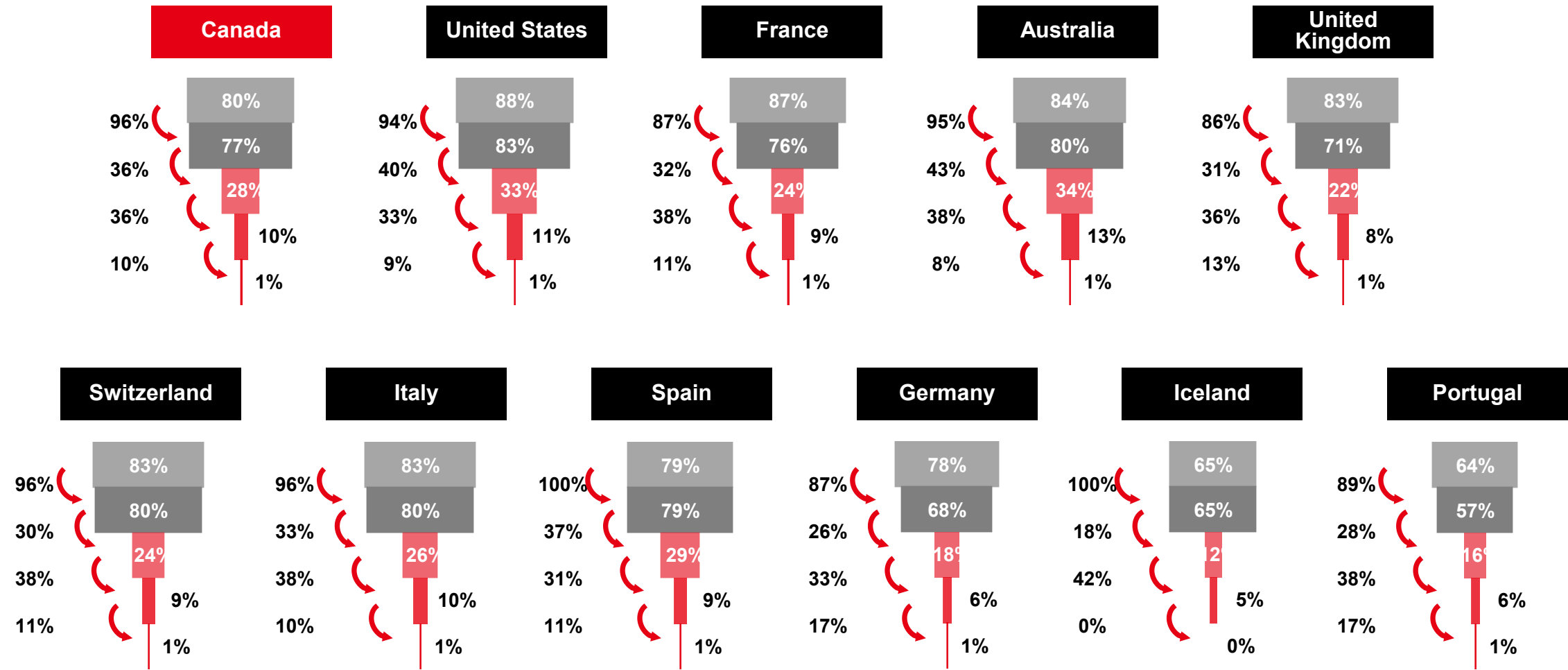| Total South Korea		HEG Audience	
Switzerland (n=453)	23% 8% *31%*	Switzerland (n=279)	25% 8% *33%*
United States (n=453)	22% 8% *30%* ↓	United States (n=292)	24% 10% *34%* +
Australia (n=454)	20% 9% *29%* ↓	Australia (n=293)	25%+ 10% *35%* +
Canada (n=1511)	21% 7% *27%* ↓	Canada (n=951)	23%+ 9%+ *32%* +
Italy (n=454)	20% 6% *26%* ↓	Italy (n=283)	23%+ 8%+ *31%* +
France (n=452)	20% 5% *25%* ↓	France (n=295)	25% 6% *31%* +
Spain (n=454)	18% 6% *23%* ↓	Spain (n=289)	21%+ 7%+ *28%* +
United Kingdom (n=453)	17% 6% *23%* ↓	United Kingdom (n=284)	20%+ 8% *28%* +
Germany (n=454)	14% 6% *19%* ↓	Germany (n=291)	16%+ 7% *23%* +
Portugal (n=453)	13% 3% *15%*	Portugal (n=275)	15% 3% *18%*
Iceland (n=453)	11% 4% *14%* ↓	Iceland (n=272)	14% 4% *17%* +

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

⊕ / ⊖ = significantly higher/lower result (HEG vs. 2024 Total)

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Evaluated [DESTINATION]
C5. How would you rate your level of knowledge of holiday opportunities in each of the following destinations? (Select one for each)

KEY DRIVERS

Liilooet
British Columbia

DESTINATION ATTRIBUTES: DRIVERS ANALYSIS (REFINED GLOBETROTTERS)

Having great historical or heritage sites and experiences is the top factor for Refined Globetrotters when they consider destinations. Secondary drivers include cities with a lot of great attractions, offering good value for money, and being a place where I can enjoy the vastness of nature.

☐ = Brand Value Statement

Attribute	Value
Has great historical or heritage sites and experiences	**9.79%**
Its cities have a lot of great attractions	**6.26%**
Offers good value for money	**5.21%**
Is a place where I can enjoy the vastness of nature	**4.81%**
Is a place I would be proud to tell people I have visited	**3.65%**
Has great outdoor and physical activities	**3.55%**
Has transport options that make it easy for me to get to from where I live	**3.27%**
Is a great place for shopping and browsing through stores	**3.19%**
Has a distinctive identity that can't be replicated by other destinations	**3.02%**
Has a great arts, festivals, and music scene	**2.89%**
Is a place trending as a must-visit spot	**2.78%**
Is a great place to see wildlife in its natural habitat	**2.72%**
Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)	**2.68%**
Is a great place for holidays that avoid surprises	**2.68%**
Is a place where I can experience things that I can't experience at home	**2.53%**
Has a culture that I would want to experience	**2.48%**
Is an environmentally-friendly travel destination	**2.46%**
Is a place that embraces cultural diversity	**2.33%**
Is a place I want to visit with my family	**2.31%**
Is a socially responsible travel destination	**2.31%**
Is a destination where I can explore new things and places	**2.25%**
Its cities have a great atmosphere	**2.24%**
Is a place where I can explore several different cities or regions in one trip	**2.22%**
Is a place with wide-open landscapes	**2.18%**
Is personally meaningful to me as a destination	**2.17%**
Has unique, natural wonders to discover	**2.13%**
Has beautiful natural scenery and landscapes	**2.10%**
Is a place where I can get away from the stresses of everyday life	**2.01%**
Is a place I want to visit with friends	**1.99%**
Has great dining and food experiences	**1.99%**
Is a place where nature can be enjoyed in close proximity to cities	**1.98%**
Is a good place to live	**1.75%**
Is a place where the people are open-minded	**1.51%**
Is a place where the people are welcoming	**1.38%**
Is a place where the people embrace new ideas	**1.18%**

Description

Key drivers analysis (KDA) seeks to identify the strongest predictors of a dependent variable. In this case, we used consideration of a destination (C2) as the dependent variable. The analysis uses a mix of linear and logistic regressions, assessing the simultaneous effect of many independent variables, destination attributes (C6) while controlling for each other.

Interpretation

Attributes with a high percentage level are more likely to impact consideration of a destination. This generally means that destinations that score highly on the top attributes may have higher consideration levels. Each percentage does also indicate the degree of relative impact. An attribute with a score of 5% is twice as impactful on consideration as an attribute with a score of 2.5%.

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Refined Globetrotters (n=312)
C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement.
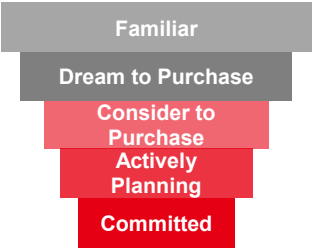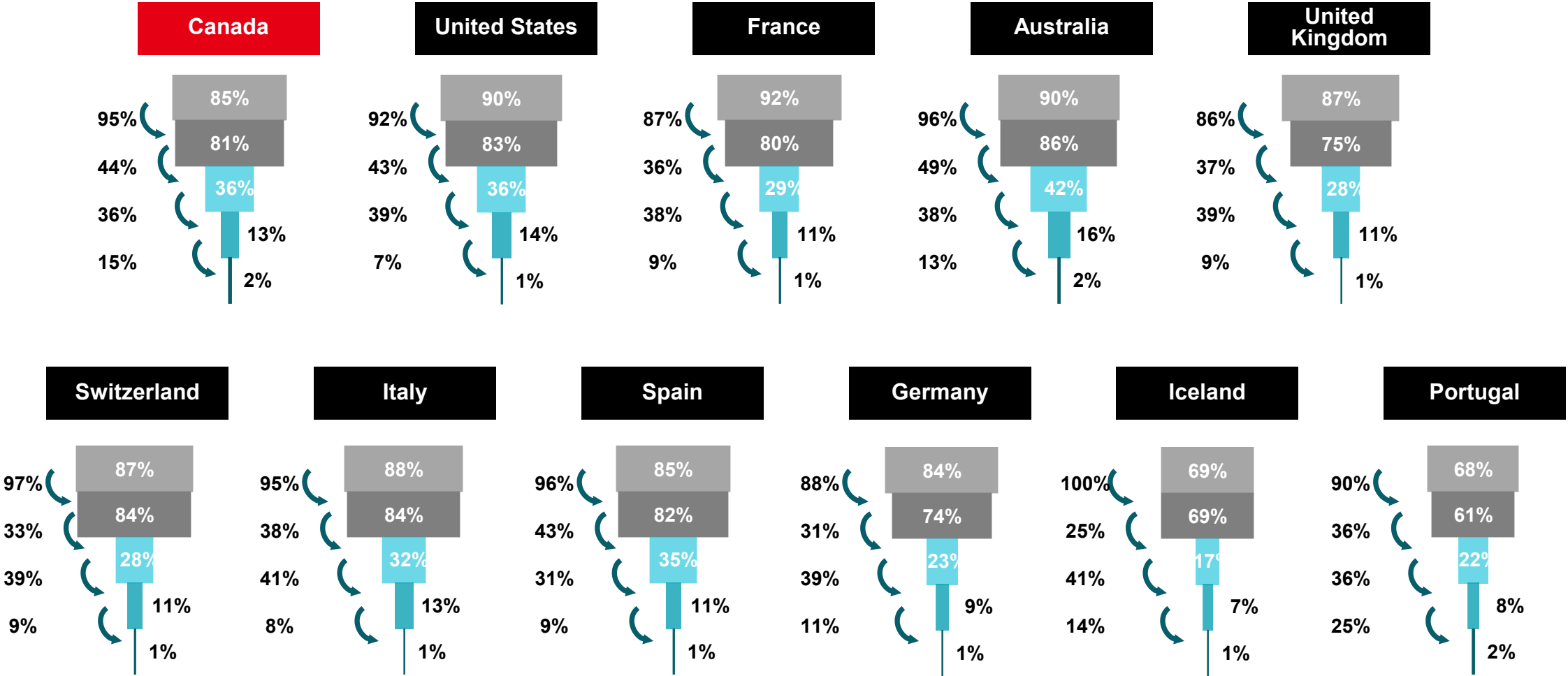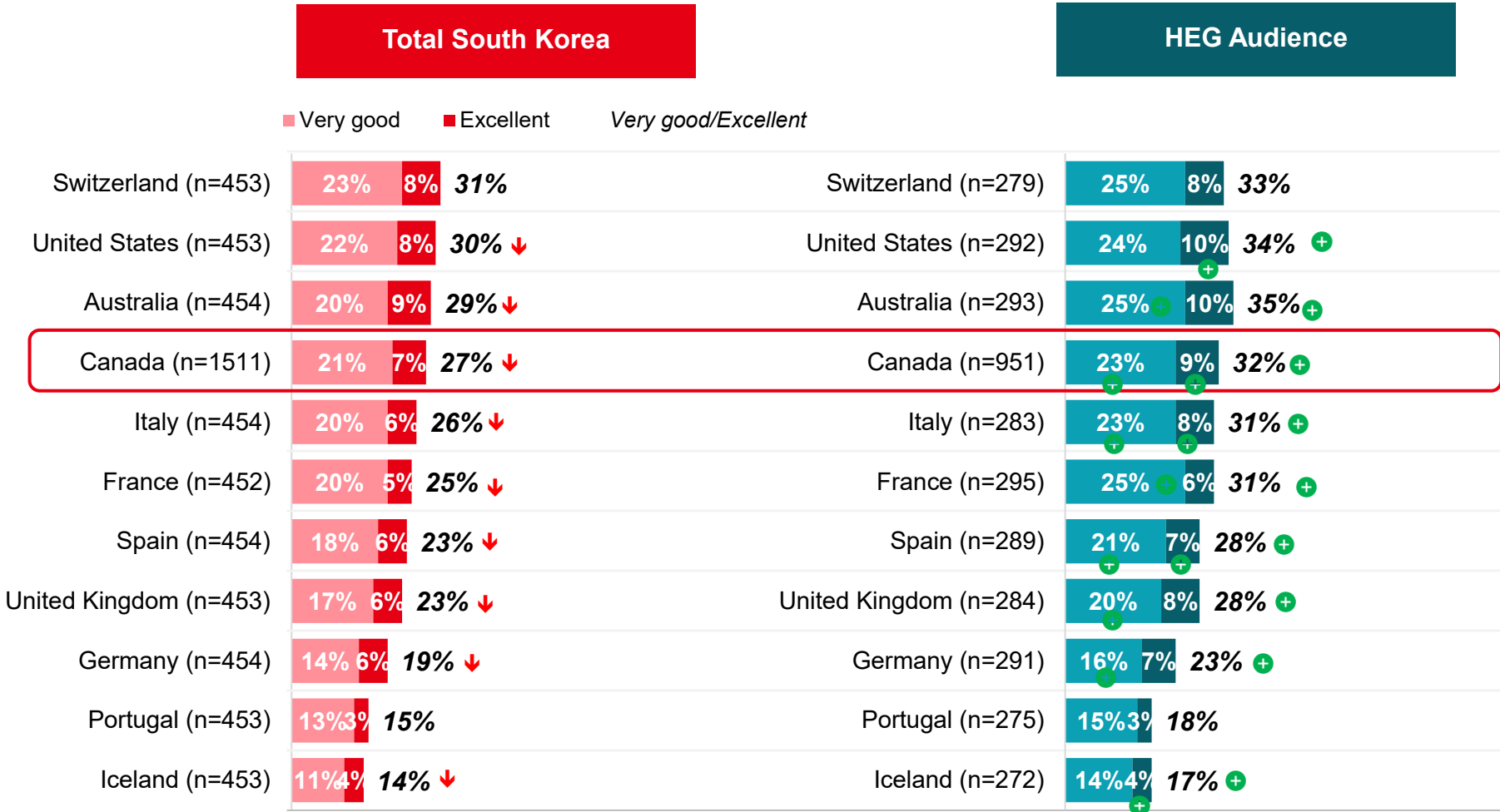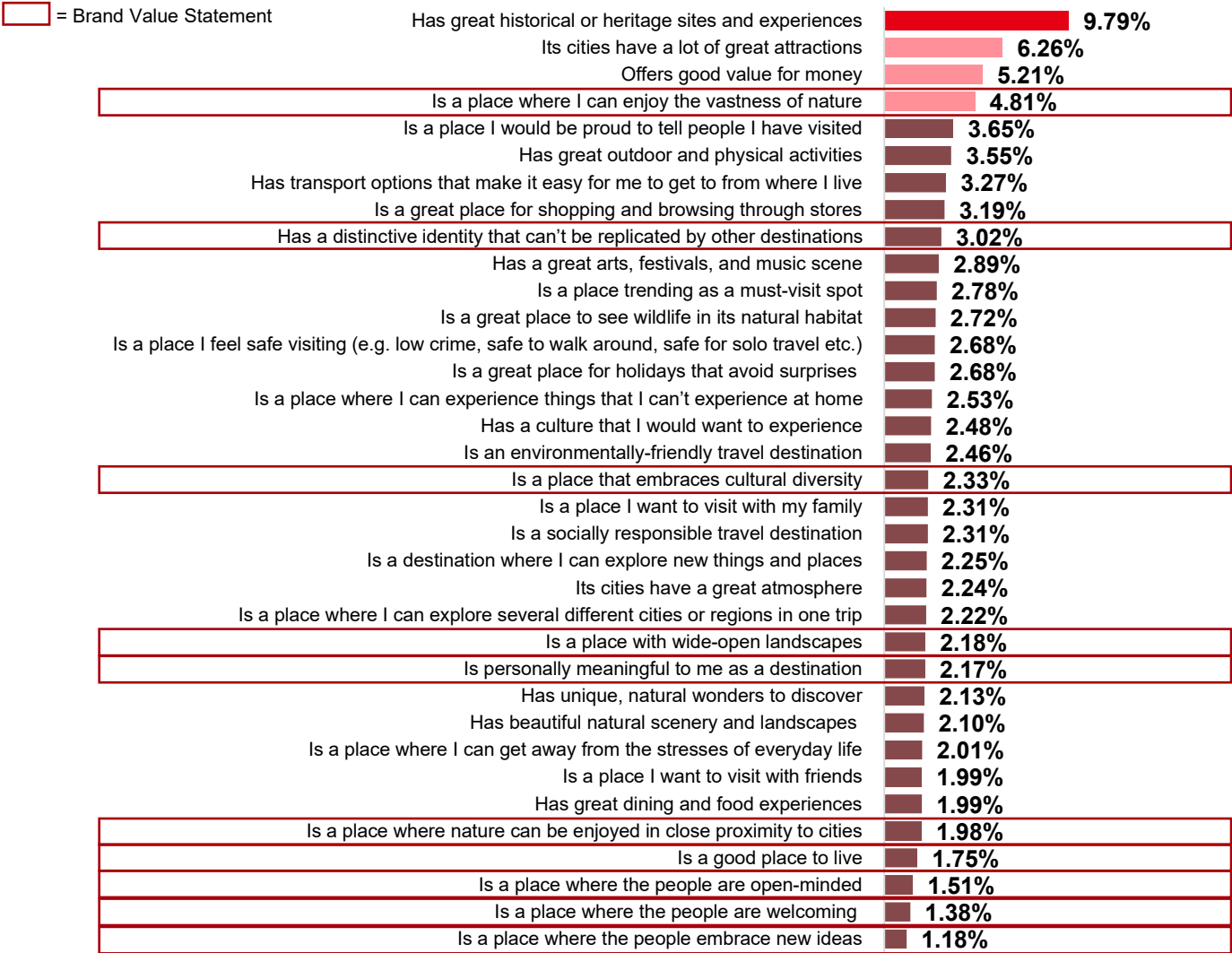Select "None of these" if you think none of the destinations apply.

DESTINATION ATTRIBUTES: RELATIVE STRENGTHS & WEAKNESSES (REFINED GLOBETROTTERS)

To RGs, Canada is a place I feel safe visiting, environmentally friendly, has great outdoor and physical activities, beautiful natural scenery and landscapes, great place to see wildlife in its natural habitat, and has unique, natural wonders to discover.

		Canada	Australia	France	Germany	Iceland	Italy	Portugal	Spain	Switzerland	United Kingdom	United States
	n=	312	102	93	102	89	96	88	94	88	80	104
Higher Order Motivations	Is a place where I can get away from the stresses of everyday life					S					W	
	Is a place I would be proud to tell people I have visited											W
	Is a destination where I can explore new things and places					S						
General Needs	Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)	S		W	S		W			S	S	W
	Is a place where I can explore several different cities or regions in one trip	W	W	S	S	W						S
	Offers good value for money				S	W			S	W	W	
	Has transport options that make it easy for me to get to from where I live					W					W	S
Type of Trip	Is a place I want to visit with friends						S					
	Is a place I want to visit with my family											
	Is a great place for holidays that avoid surprises			W								
	Is a place where I can experience things that I can't experience at home					S						
	Is an environmentally-friendly travel destination	S	S	W	W	S	W		W	S	W	W
	Is a socially responsible travel destination				S						S	
	Is a place trending as a must-visit spot	W		S		W		W		S		
To-Do	Is a great place for shopping and browsing through stores	W	W	S		W		W			W	S
	Its cities have a lot of great attractions	W		S	S	W					W	
	Has great outdoor and physical activities	S	S	W						S		
	Has great dining and food experiences								S			
	Has a great arts, festivals, and music scene	W		S	S	W			W		S	
To-See	Its cities have a great atmosphere	W				W				S	S	
	Has beautiful natural scenery and landscapes	S	S	W		S				S		
	Is a great place to see wildlife in its natural habitat	S	S	W			W		W		W	
	Has great historical or heritage sites and experiences	W		S	S	W	S	S			W	W
	Has a culture that I would want to experience	W				W					S	
	Has unique, natural wonders to discover	S	S	W	W	S	W		W	S	W	

No destination has a strength for this statement

🟩 **Strength**   🟥 **Weakness**

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Refined Globetrotters, Evaluated [DESTINATION]
C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement.
Select "None of these" if you think none of the destinations apply.

BRAND VALUE STATEMENTS (REFINED GLOBETROTTERS)

To RGs, Canada is also a place with wide-open landscapes, where nature can be enjoyed in close proximity to cities, a good place to live, and a place I can enjoy the vastness of nature.

	Canada	Australia	France	Germany	Iceland	Italy	Portugal	Spain	Switzerland	United Kingdom	United States
n=	312	102	93	102	89	96	88	94	88	80	104
Is a place with wide-open landscapes	S	S	W	W	S	W	W	W	S	W	S
Is a place where nature can be enjoyed in close proximity to cities	S								S		
Is a place that embraces cultural diversity			S		W	W				W	S
Is a place where the people are welcoming			W				S				
Is a place where the people are open-minded								S			S
Is a place where the people embrace new ideas											S
Is a good place to live	S	S	W	S	W	W	W		S		W
Has a distinctive identity that can't be replicated by other destinations	W				S	S					W
Is personally meaningful to me as a destination	W										
Is a place where I can enjoy the vastness of nature	S	S	W	W	S	W	W		S	W	

No destination has a strength for this statement

Strength (green) Weakness (pink)

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Refined Globetrotters, Evaluated [DESTINATION]
C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement.
Select "None of these" if you think none of the destinations apply.

South Korea GTRP – December 2024

Perceptions of Canada as being a place where I can enjoy the vastness of nature are high and should continue to be maintained. That said, there is opportunity to further develop perceptions of Canada as having great historical/heritage sites and experiences, offering good value for money, and having a lot of great attractions.

Relative Strength/Weakness for Canada

Weaker Influence/ Higher Perception of Canada

Stronger Influence/ Higher Perception of Canada

Weaker Influence/ Lower Perception of Canada

Stronger Influence/ Weaker Perception of Canada

Is a place with wide-open landscapes
Is a good place to live
Is a place where I can enjoy the vastness of nature
Is an environmentally-friendly travel destination
Has beautiful natural scenery and landscapes
Has great outdoor and physical activities
Is a place where nature can be enjoyed in close proximity to cities
Has unique, natural wonders to discover
Is a place where the people embrace new ideas
Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)
Is a socially responsible travel destination
Is a place where I can get away from the stresses of everyday life
Is a great place for holidays that avoid surprises
Has transport options that make it easy for me to get to from where I live
Is a place where the people are welcoming
Is a place where the people are open-minded
Is a place that embraces cultural diversity
Offers good value for money
Is a place I want to visit with friends
Is a place I want to visit with my family
Is personally meaningful to me as a destination
Is a place where I can experience things that I can't experience at home
Is a place I would be proud to tell people I have visited
Is a destination where I can explore new things and places
Its cities have a great atmosphere
Is a place trending as a must-visit spot
Has great historical or heritage sites and experiences
Has great dining and food experiences
Is a great place for shopping and browsing through stores
Its cities have a lot of great attractions
Has a distinctive identity that can't be replicated by other destinations
Is a place where I can explore several different cities or regions in one trip
Has a culture that I would want to experience
Has a great arts, festivals, and music scene

Influence on Likelihood to Consider Any Destination

⬭ = Primary key driver
⬭ = Secondary key driver

Dezadeash River
Yukon

SEASONAL TRAVEL

TOP UNAIDED FALL DESTINATIONS: BY SEGMENTS

For top of mind Fall destinations, Canada falls behind other Asia countries for OEs and CSs. Among RGs and PDFs in particular, Canada is not a top destination.

Outdoor Explorers
(n=131)

Japan	48%
China	37%
Taiwan	17%
Vietnam	9%
South Korea	9%
Thailand	6%
Canada	5%

Culture Seekers
(n=121)

Japan	58%
Taiwan	26%
China	25%
South Korea	11%
Thailand	9%
Vietnam	6%
Canada	5%
Singapore	4%

Refined Globetrotters
(n=140)

Japan	52%
China	29%
Taiwan	18%
South Korea	16%
Vietnam	8%
Thailand	7%
Singapore	5%

Canada receives: 1% mentions

Purpose Driven Families
(n=41*)

Japan	59%
China	28%
Taiwan	25%
South Korea	13%
Singapore	9%
United States	7%
Vietnam	7%
Australia	5%
Thailand	4%

Canada receives: 2% mentions

Note: respondents were asked either about winter travel (B2/D2/E13) or autumn travel (B3/D3/E14)
Base: Long-haul pleasure travellers (past 3 years or next 2 years)
B3. What destinations come to mind when thinking about travel to experience the **autumn season**? (Please list up to 3 destinations. You can mention destinations within or outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan).) [DESCRIPTION] Please note: You do not have to limit your responses to destinations you are considering for a holiday trip.
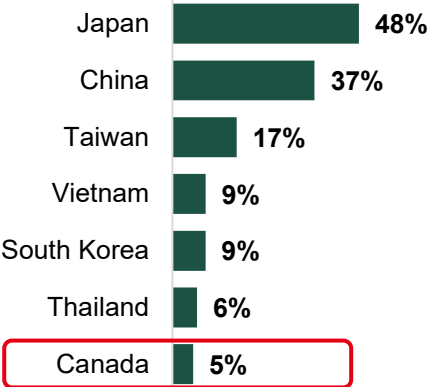*Small base size, interpret with caution (n<50)

TOP UNAIDED WINTER DESTINATIONS: BY SEGMENTS

For top of mind Winter destinations, Canada falls behind other Asia countries among RGs, but performs better than among other segments

Outdoor Explorers
(n=152)
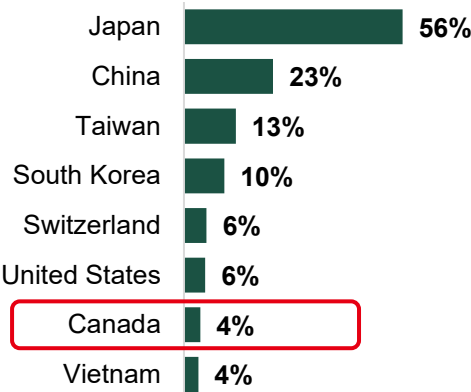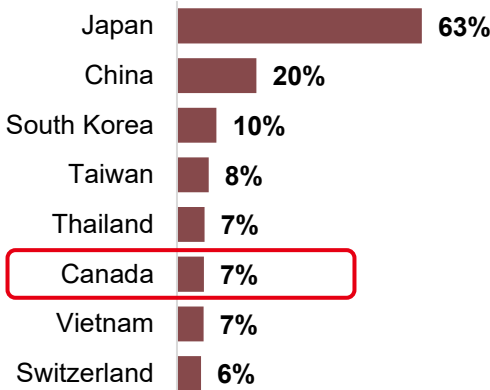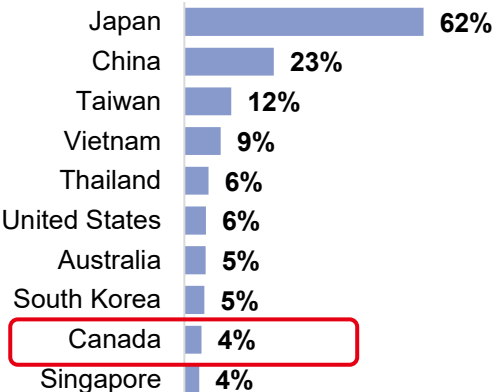
Destination	%
Japan	56%
China	23%
Taiwan	13%
South Korea	10%
Switzerland	6%
United States	6%
Canada	**4%**
Vietnam	4%

Culture Seekers
(n=137)

Destination	%
Japan	62%
China	23%
Taiwan	12%
Vietnam	9%
Thailand	6%
United States	6%
Australia	5%
South Korea	5%
Canada	**4%**
Singapore	4%

Refined Globetrotters
(n=172)

Destination	%
Japan	63%
China	20%
South Korea	10%
Taiwan	8%
Thailand	7%
Canada	**7%**
Vietnam	7%
Switzerland	6%

Purpose Driven Families
(n=57)

Destination	%
Japan	65%
China	32%
Taiwan	12%
Guam	6%
Singapore	5%
Vietnam	5%
Switzerland	5%
United States	4%
South Korea	4%
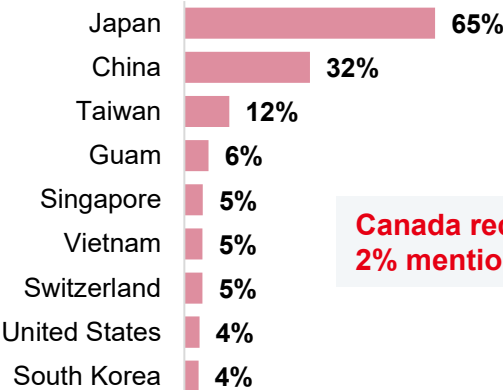
Canada receives: 2% mentions

Note: respondents were asked either about winter travel (B2/D2/E13) or autumn travel (B3/D3/E14)
Base: Long-haul pleasure travellers (past 3 years or next 2 years)
B2. What destinations come to mind when thinking about travel to experience the **winter season**? (Please list up to 3 destinations. You can mention destinations within or outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan).) [DESCRIPTION] Please note: You do not have to limit your responses to destinations you are considering for a holiday trip.

SEASONAL CONSIDERATION BY DESTINATION

Canada is one of the top considerations for Fall travel among South Korean travellers and HEGs. HEGs are more likely to consider Canada for Winter and Summer travel.

Total South Korea	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
Australia (n=365)	35%	32%	29%	29%
Canada (n=1157)	25%	26%	30%	39%
France (n=340)	25%	36%	26%	32%
Germany (n=306)	17%	34%	34%	39%
Iceland (n=293)	32%	19%	36%	27%
Italy (n=358)	17%	33%	31%	29%
Portugal (n=258)	26%	36%	32%	32%
Spain (n=356)	20%	32%	28%	34%
Switzerland (n=364)	30%	32%	33%	34%
United Kingdom (n=320)	24%	38%	25%	32%
United States (n=374)	20%	38%	26%	36%

HEG Audience	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
Australia (n=253)	35%	35%	31%	29%
Canada (n=762)	28% ➕	28%	33% ➕	40%
France (n=234)	27%	40% ➕	30% ➕	31%
Germany (n=215)	18%	33%	37%	38%
Iceland (n=185)	34%	22%	40%	29%
Italy (n=235)	20%	34%	33%	31%
Portugal (n=168)	33% ➕	41% ➕	33%	36% ➕
Spain (n=240)	24% ➕	36% ➕	28%	35%
Switzerland (n=235)	33%	35%	36%	34%
United Kingdom (n=210)	29% ➕	40%	26%	34%
United States (n=243)	23%	40%	28%	37%

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

➕ / ➖ = significantly higher/lower result (HEG vs. 2024 Total)

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Those in the dream to purchase stages of the path to purchase for [DESTINATION]
C7. For each of the following destinations, during which months would you consider taking a holiday trip in the next 2 years?

FALL/WINTER CONVERSION – TOTAL SOUTH KOREA

There is a higher conversion between those who typically travel during the Winter months and interest in taking a trip during a destination's Winter season (69%) compared to Fall travellers and interest in taking a trip during a destination's Fall season (58%). That said, the demand to travel during the Fall months is significantly higher than for the Winter months, meaning Canada has a higher potential target market for the Fall season (6.4M) compared to the Winter Season (4.2M) despite the higher conversion rates.

Fall

57.2% ↑
Demand During Fall **Months**
(any destination)

12,389,500

58%

33.2%
Extremely Interested in
Visiting a Destination During
its Fall **Season**
(any destination)

7,191,000

90%

38.5%
Next 2 Year Potential Target
Market **for CANADA During
Fall Season**

6,436,500

Winter

25.9% ↓
Demand During Winter **Months**
(any destination)

5,599,500

69%

17.7%
Extremely Interested in
Visiting a Destination During
its Winter **Season**
(any destination)

3,839,000

108%

24.9%
Next 2 Year Potential Target
Market **for CANADA During
Winter Season**

4,154,500

Base: Long-haul pleasure travellers (past 3 years or next 2 years)
D1. In general, what time of year do you typically like to take holiday trips? Select all that apply Total (n=1511)
D3. In general, how interested are you in taking a holiday trip to a destination during <u>its autumn season</u>? Total (n=722)
D2. In general, how interested are you in taking a holiday trip to a destination during <u>its winter season</u>? Total (n=789)
C7. For each of the following destinations, during which months would you consider taking long-haul trip <u>in the next two years</u>? Total (n=1157)

South Korea GTRP – December 2024   32

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

FALL/WINTER CONVERSION – HEGS

A similar pattern is true among HEGs, in that Canada's potential target market is higher for the Fall season, with 4.4M HEGs compared to 3.0M for Winter.

Fall

57.6%
Demand During Fall **Months**
(any destination)

7,788,000

63%

36.5%
Extremely Interested in
Visiting a Destination During
its Fall **Season**
(any destination)

4,933,000

89%

40.3%
Next 2 Year Potential Target
Market **for CANADA During
Fall Season**

4,395,500

Winter

25.9%
Demand During Winter **Months**
(any destination)

3,505,000

81%

21.0%
Extremely Interested in
Visiting a Destination During
its Winter **Season**
(any destination)

2,836,500

106%

27.6%
Next 2 Year Potential Target
Market **for CANADA During
Winter Season**

3,010,000

Base: Long-haul pleasure travellers (past 3 years or next 2 years), HEGs
D1. In general, what time of year do you typically like to take holiday trips? Select all that apply (n=951)
D3. In general, how interested are you in taking a holiday trip to a destination during **its autumn season**? (n=433)
D2. In general, how interested are you in taking a holiday trip to a destination during **its winter season**? (n=518)
C7. For each of the following destinations, during which months would you consider taking long-haul trip in the next two years? (n=762)

UNIQUENESS OF CANADA AS FALL DESTINATION: BY SEGMENTS

Almost six in ten South Korean travellers perceive Canada as a distinct Fall destination, and this is higher among Culture Seekers.

Top 3 box

	Total South Korea	Outdoor Explorers	Culture Seekers	Refined Globetrotters	Purpose Driven Families
	58%	62%	67%	61%	62%

Legend:
- 7 - Extremely distinct
- 6
- 5
- 4 - Moderately distinct
- 3
- 2
- 1 Not distinct at all

	Total South Korea	Outdoor Explorers	Culture Seekers	Refined Globetrotters	Purpose Driven Families
7 - Extremely distinct	9%	12%	8%	12%	13%
6	24%	27%	31%	26%	29%
5	25%	24%	28%	22%	19%
4 - Moderately distinct	35%	33%	26%	29%	35%
3	4%	3%	4%	7%	4%

UNIQUENESS OF CANADA AS WINTER DESTINATION: BY SEGMENTS

Almost six in ten South Korean travellers also view Canada as a distinct Winter destination, and this is also higher among Culture Seekers.
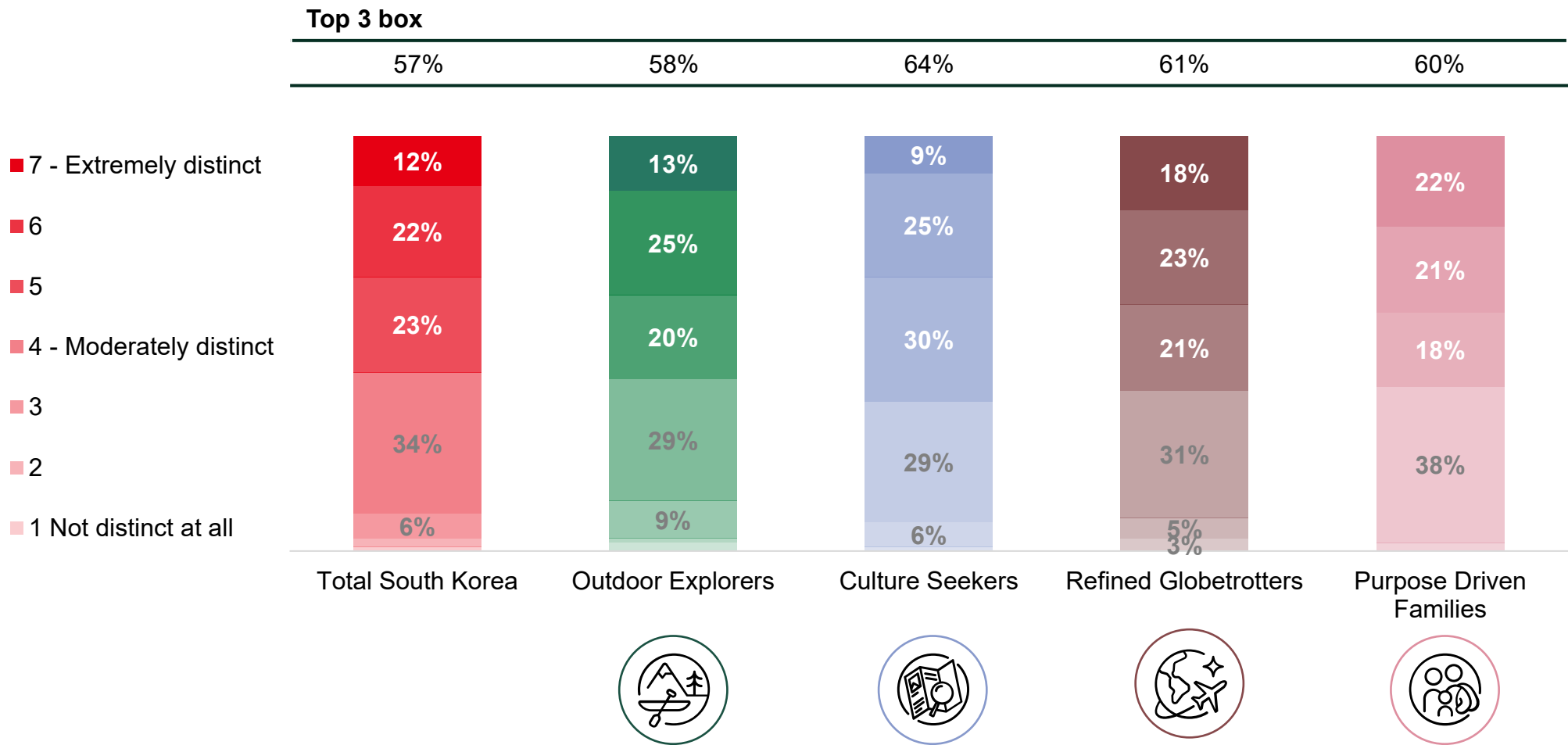
Top 3 box

Total South Korea	Outdoor Explorers	Culture Seekers	Refined Globetrotters	Purpose Driven Families
57%	58%	64%	61%	60%

Legend:
- 7 - Extremely distinct
- 6
- 5
- 4 - Moderately distinct
- 3
- 2
- 1 Not distinct at all

Total South Korea
- 12%
- 22%
- 23%
- 34%
- 6%

Outdoor Explorers
- 13%
- 25%
- 20%
- 29%
- 9%

Culture Seekers
- 9%
- 25%
- 30%
- 29%
- 6%

Refined Globetrotters
- 18%
- 23%
- 21%
- 31%
- 5%
- 3%

Purpose Driven Families
- 22%
- 21%
- 18%
- 38%

Note: respondents were asked either about winter travel (B2/D2/E13) or autumn travel (B3/D3/E14)
Base: Long-haul pleasure travellers (past 3 years or next 2 years): Total (n=789); Outdoor Explorers (n=152); Culture Seekers (n=137); Refined Globetrotters (n=172); Purpose Driven Families (n=57)
E13. How distinct is Canada as a winter travel destination?

INDIGENOUS TRAVEL

Carcross
Yukon

FACTORS TO DRIVE INTEREST IN INDIGENOUS CULTURAL EXPERIENCES: BY SEGMENTS

Safety/comfort, authenticity, and accessibility/ease of travel are the top factors most likely to drive interest in Indigenous experiences. Of note, a particularly high proportion of RGs selected safety and comfort.

Legend: ■ Outdoor Explorers ■ Culture Seekers ■ Refined Globetrotters ■ Purpose Driven Families

Factor	Outdoor Explorers	Culture Seekers	Refined Globetrotters	Purpose Driven Families
Safety and comfort of the destination	47%	52%	71%	44%
Authenticity of the experiences	44%	35%	49%	46%
Accessibility and ease of travel	32%	31%	39%	37%
Cultural significance and uniqueness	36%	52%	40%	37%
Recommendations and reviews	27%	25%	19%	25%
Personal interest in Indigenous cultures	25%	18%	12%	14%
Smaller group size or intimate experiences	18%	16%	9%	13%
Availability of information and marketing	11%	14%	9%	12%
Availability of short experiences (1-3 hours)	12%	9%	11%	22%
Availability of full-day experiences (6+ hours)	8%	6%	8%	17%

Note: respondents were asked either about interest in Indigenous destinations (C10) or factors to drive interest in Indigenous cultural experiences (C11)
Base: Long-haul pleasure travellers (past 3 years or next 2 years): Outdoor Explorers (n=155); Culture Seekers (n=121); Refined Globetrotters (n=151); Purpose Driven Families (n=56)
C11. What factors would increase your interest in participating in Indigenous cultural experiences and tourism activities in a destination? (Select up to 3)

TRAVEL BEHAVIOURS

GENERAL ACTIVITIES INTERESTED IN

Top activities on any holiday include nature walks, trying local food and drink, and oceanside beaches.

■ Total South Korea ■ HEG Audience

Activity	Total	HEG
Nature walks	65% ↓	63%
Trying local food and drink	55% ↓	51% ⊖
Oceanside beaches	50%	49%
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	47% ↓	45%
Nature parks	43% ↓	43%
Local markets (e.g. public markets, farmers market, night markets)	42% ↓	41%
Lakeside beaches	37%	38%
Autumn colours	35%	32% ⊖
City green spaces like parks or gardens	35% ↓	35%
Art galleries or museums	34% ↓	37% ⊕
Camping	33%	34%
Cultural or traditional festivals	33% ↓	35% ⊕
Food and drink festivals or events	33% ↓	33%
Spring blossoms	32%	30% ⊖
Shopping for clothes and shoes	30%	27% ⊖
Amusement or theme parks	29% ↓	30%
Shopping for items that help me remember my trip	29% ↓	28%
Culinary tours or cooking classes	28%	29%
Northern lights	28% ↓	28%

Activity	Total	HEG
Historical, archaeological or world heritage sites	26% ↓	30% ⊕
Hiking	25% ↓	28% ⊕
Fine dining	24% ↓	26% ⊕
Guided nature tours	23% ↓	25% ⊕
Self-guided driving tours or road trips	23% ↓	23%
Spa or wellness centres	23%	23%
Cruises	22% ↓	23%
Viewing wildlife or marine life	22% ↓	24% ⊕
Music festivals	21% ↓	23% ⊕
Winter festivals	21% ↓	23%
Guided city tours	20% ↓	22% ⊕
Breweries or wineries	19% ↓	19%
Wilderness lodges	19% ↓	22% ⊕
Golfing	18%	20% ⊕
Learning about Indigenous culture, traditions or history	18% ↓	21% ⊕
Live shows (e.g. concerts, theatre, opera, symphony, etc.)	18% ↓	20% ⊕
Guided train tours	17% ↓	19%
Movie festivals	15% ↓	17% ⊕
Fishing or angling	14%	15% ⊕

Activity	Total	HEG
Nightlife	14%	16% ⊕
Casual biking	13% ↓	14%
Shopping for luxury items	13% ↓	15% ⊕
Sporting events (to attend or participate)	13% ↓	15% ⊕
Downhill skiing or snowboarding	12% ↓	15% ⊕
Guided airplane or helicopter tours	11% ↓	14% ⊕
Exploring places most tourists won't go to	10%	13% ⊕
Guided boat tours	10%	12% ⊕
Renting a recreational vehicle (RV)	10% ↓	11%
Travelling to remote destinations	9%	11% ⊕
Agricultural or country farm tours	9% ↓	11% ⊕
Kayaking, canoeing or paddle boarding	8%	10% ⊕
Road cycling	8%	10% ⊕
Rodeos	6%	7% ⊕
Comedy festivals	5% ↓	6% ⊕
Hunting	4%	6% ⊕
Mountain biking	4%	6% ⊕
Snowshoeing or cross country skiing	4%	6% ⊕
Heli-skiing	3%	5% ⊕

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

⊕ / ⊖ = significantly higher/lower result (HEG vs. 2024 Total)

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1511); HEG (n=951)
D4. In general, what activities or places are you interested in while on holiday? (Select all that apply)

MOST IMPORTANT SUSTAINABILITY EFFORTS (TOP 6): BY SEGMENTS

Importance of various sustainability efforts vary by segment. In particular, Refined Globetrotters place higher importance on conservation of natural areas in their destination. PDFs seek eco-friendly accommodations in their destination.

Legend:
- ■ Outdoor Explorers
- ■ Culture Seekers
- ■ Refined Globetrotters
- ■ Purpose Driven Families

	Outdoor Explorers	Culture Seekers	Refined Globetrotters	Purpose Driven Families
Conservation of natural areas in my destination	36%	35%	48% (+)	46%
Eco-friendly transportation options in my destination (e.g., public transport, ride share, etc.)	27% (−)	40%	33%	36%
Eco-friendly accommodations in my destination	29%	31%	38%	46% (+)
Knowing that the local community in my destination is open and welcoming to travellers	31%	38%	32%	31%
Dining options that use local and/or organic ingredients	32%	27%	33%	25%
Knowing that the local culture of my destination is not negatively impacted by tourism	22%	24%	24%	18%

Note: respondents were asked either about most important sustainability efforts (D8) or barriers to sustainable travel (D9)
Base: Long-haul pleasure travellers (past 3 years or next 2 years): Outdoor Explorers (n=143); Culture Seekers (n=139); Refined Globetrotters (n=156); Purpose Driven Families (n=47)
D8. What are the top 3 sustainability efforts that are most important to you when selecting a holiday destination? Select up to three choices.

South Korea GTRP – December 2024

+ / − = significantly higher/lower result (Segments vs. 2024 Total)

BARRIERS TO SUSTAINABLE TRAVEL

The biggest barriers to sustainable travel are the lack of information and being expensive, although mentions for being expensive and too time consuming have decreased compared to last year. HEGs are more likely to say travelling sustainably would limit the types of activities they can do and doesn't meet their needs for luxury, as barriers.

■ Total South Korea   ■ HEG Audience

There is a lack of information about how to travel sustainably
- **36%**
- **34%**

Sustainable travel is more expensive
- **34%** ↓
- **32%**

Travelling sustainably is too time consuming
- **21%** ↓
- **22%**

Travelling sustainably would limit the types of activities I can do
- **21%**
- **26%** ➕

Sustainable travel doesn't meet my needs for comfort when travelling
- **20%**
- **21%**

Sustainable travel doesn't meet my needs for luxury when travelling
- **12%**
- **16%** ➕

None of the above
- **16%** ↑
- **13%** ➖

Sustainable Travel Description

Sustainable travel refers to "travel that minimizes any negative impacts on the destination's environment, economy and society, while making positive contributions to the local people and conserving the destination's natural and cultural heritage".
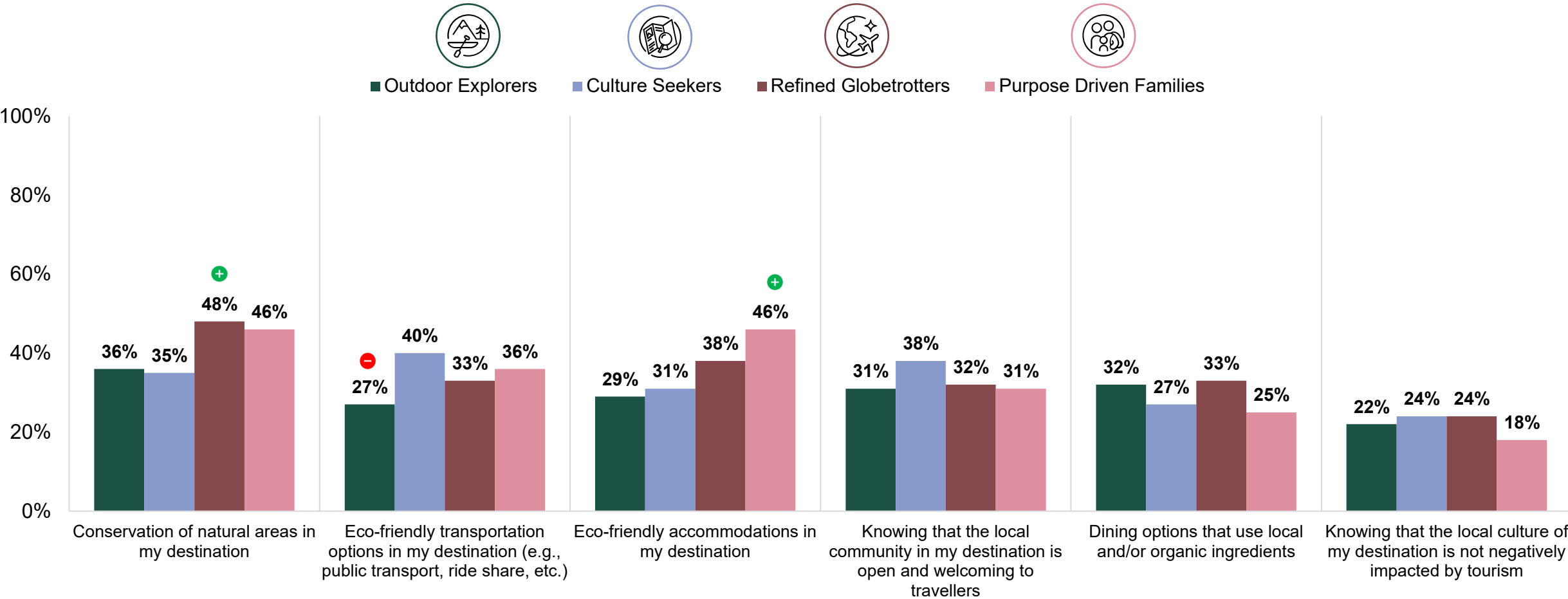
↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

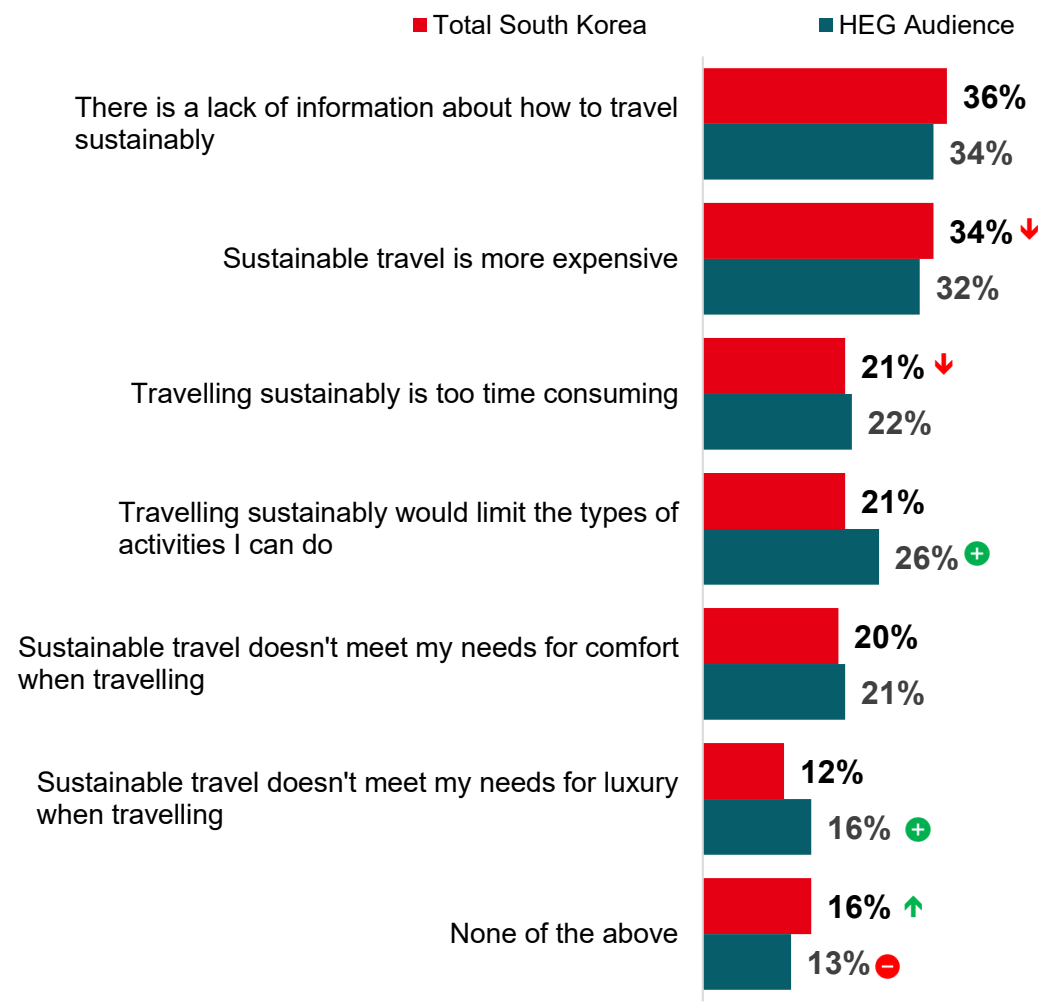➕ / ➖ = significantly higher/lower result (HEG vs. 2024 Total)

Note: respondents were asked either about most important sustainability efforts (D8) or barriers to sustainable travel (D9)
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=741); HEG (n=466)
D9. Which of the following factors prevents you from choosing sustainable travel options? Select all that apply.

USAGE OF AI TOOLS TO PLAN TRIPS

Usage of AI in trip planning has increased compared to last year and is higher among HEGs.
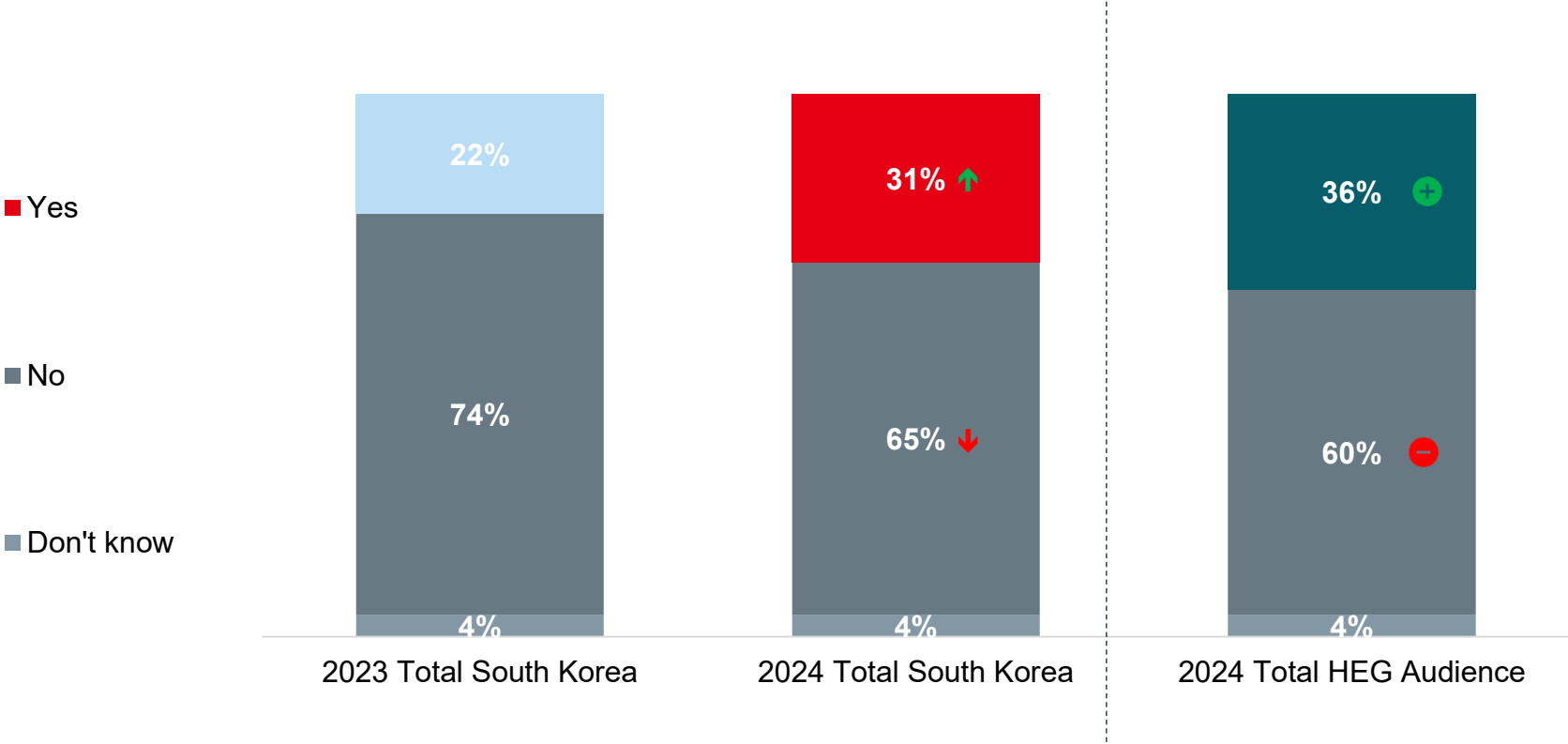
Legend:
- ■ Yes
- ■ No
- ■ Don't know

2023 Total South Korea
- 22%
- 74%
- 4%

2024 Total South Korea
- 31% ↑
- 65% ↓
- 4%

2024 Total HEG Audience
- 36% ⊕
- 60% ⊖
- 4%

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)
⊕ / ⊖ = significantly higher/lower result (HEG vs. 2024 Total)

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1511); HEG (n=951)
D14. Have you ever used an AI tool (e.g. ChatGPT or Bard) to research or plan a trip?

CANADA TRAVEL BARRIERS AND MOTIVATORS

BARRIERS FOR TRAVEL TO CANADA (TOP 9): BY SEGMENTS

The flight being too far/long is the biggest barrier for travelling to Canada among RGs, OEs, and PDFs, although less so for OEs. CSs are equally likely to identify the flight being too far/long and cost as the biggest barriers to travelling to Canada.
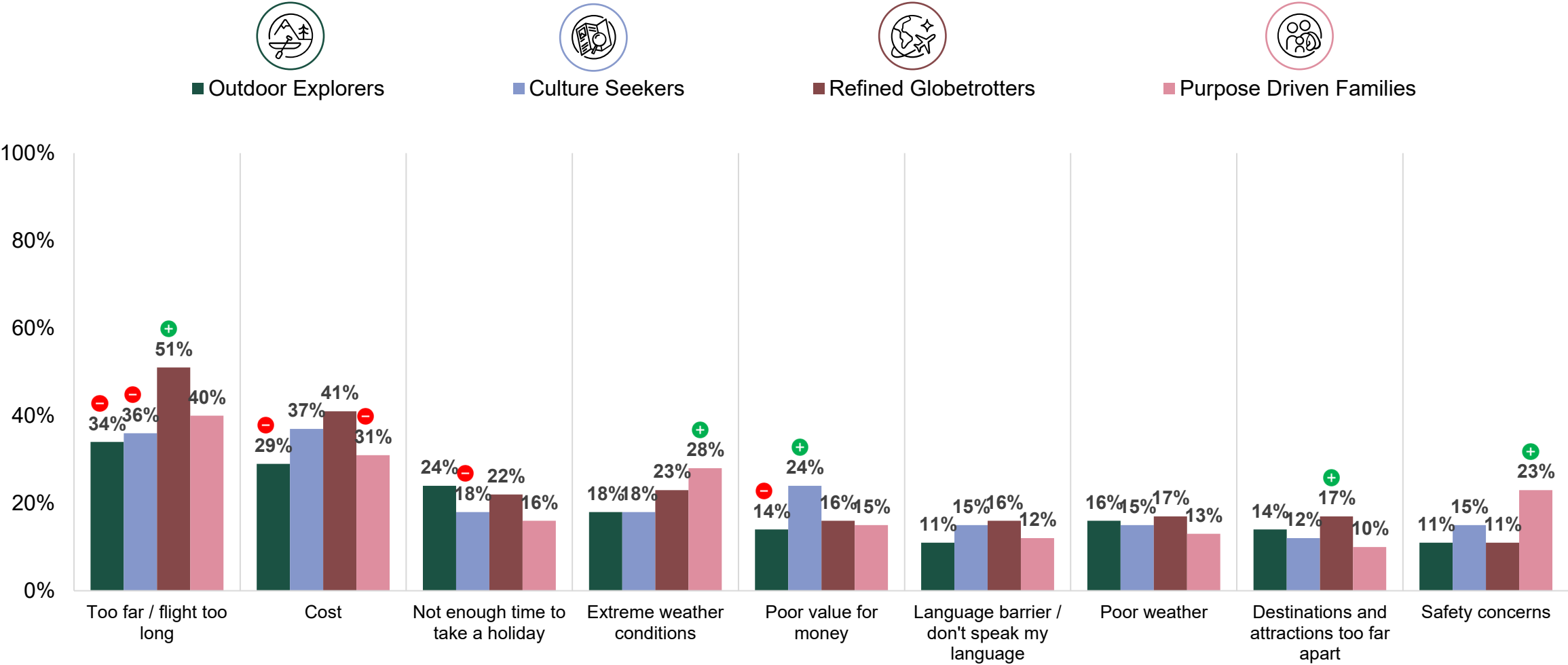
- ■ Outdoor Explorers
- ■ Culture Seekers
- ■ Refined Globetrotters
- ■ Purpose Driven Families

Barrier	Outdoor Explorers	Culture Seekers	Refined Globetrotters	Purpose Driven Families
Too far / flight too long	34% ⊖	36% ⊖	51% ⊕	40%
Cost	29% ⊖	37%	41%	31% ⊖
Not enough time to take a holiday	24% ⊖	18%	22%	16%
Extreme weather conditions	18%	18%	23%	28% ⊕
Poor value for money	14% ⊖	24% ⊕	16%	15%
Language barrier / don't speak my language	11%	15%	16%	12%
Poor weather	16%	15%	17%	13%
Destinations and attractions too far apart	14%	12%	17% ⊕	10%
Safety concerns	11%	15%	11%	23% ⊕

Base: Long-haul pleasure travellers (past 3 years or next 2 years) Outdoor Explorers (n=283); Culture Seekers (n=258); Refined Globetrotters (n=312); Purpose Driven Families (n=98)
E5. Which of the following factors might discourage you from visiting Canada? (Select all that apply)

South Korea GTRP – December 2024   44

⊕ / ⊖ = significantly higher/lower result (HEG vs. 2024 Total)

MOTIVATORS & BARRIERS FOR FALL TRAVEL TO CANADA

Wanting to enjoy the fall foliage and ideal weather remain the top motivators for travelling to Canada in the Fall months. Of note, wanting to travel to leverage the Chusok holiday has decreased, while mentions of cheaper travel prices have increased compared to last year. Being unable to take a holiday during these months remains the biggest barrier.

Motivators for Fall Travel

■ 2024 (n=743) ■ 2023 (n=773)

	2024	2023
I want to enjoy fall foliage/autumn colours in Canada	44%	46%
The weather is ideal at the places I want to visit during these months	41%	40%
I am able to take a holiday during these months	28%	25%
I want to travel leveraging Chusok holiday	18% ↓	24%
There are places in Canada I'd only want to visit during these months	18%	14%
There are less crowds at the places I want to visit during these months	14%	13%
Travel prices are cheaper during these months	14% ↑	8%
There are specific activities I want to do in Canada that are available in these months	10%	12%
It's school holidays so I can enjoy a family trip	9%	8%
I need to visit for business / work	3%	n/a

Barriers for Fall Travel

■ 2024 (n=414) ■ 2023 (n=506)

	2024	2023
I am unable to take a holiday during these months	38%	39%
Travel prices are more expensive during these months	20%	18%
The weather is not ideal at the places I want to visit during these months	15%	13%
There are other places I'd rather visit during these months	15%	12%
I don't know enough about what activities are available during these months	11%	11%
My kids are in school and I don't want them to miss class	11%	12%
There are too many crowds at the places I want to visit during these months	11%	9%
The activities I want to do are not available in these months	7%	8%

South Korea GTRP – December 2024
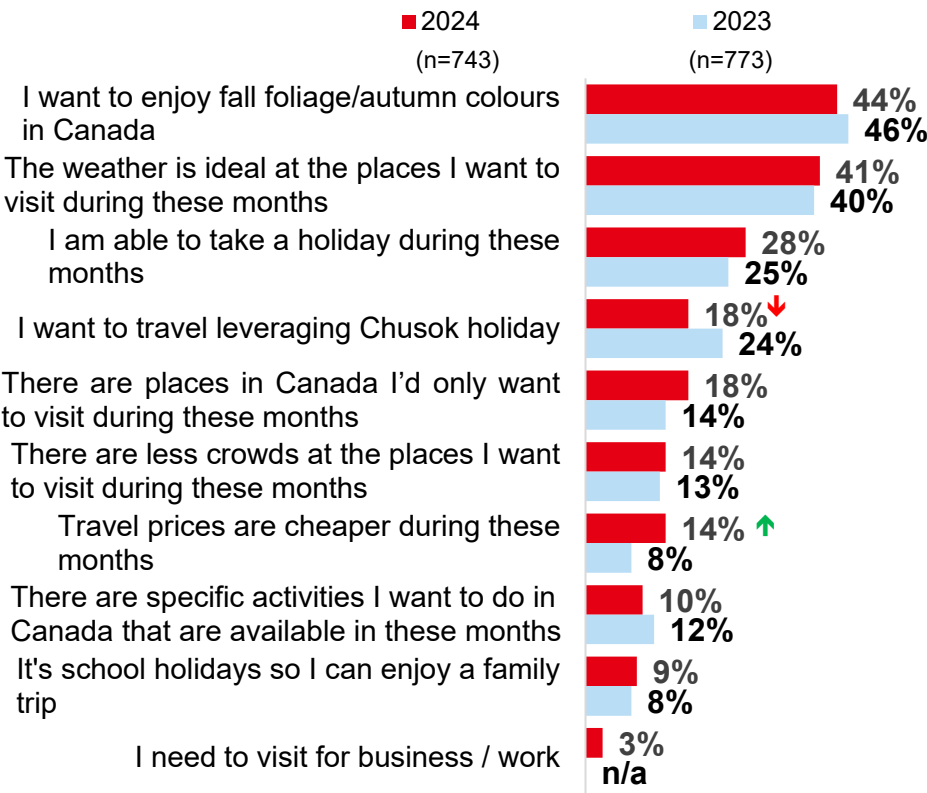
↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

MOTIVATORS FOR FALL TRAVEL TO CANADA: BY SEGMENTS

Wanting to enjoy the fall foliage and ideal weather are the top motivators for RGs, OEs, and CSs, while being able to take a holiday during these months is the top motivator for PDFs.

■ Outdoor Explorers ■ Culture Seekers ■ Refined Globetrotters ■ Purpose Driven Families

Category	Outdoor Explorers	Culture Seekers	Refined Globetrotters	Purpose Driven Families
I want to enjoy fall foliage/autumn colours in Canada	41%	41%	50%	32%
The weather is ideal at the places I want to visit during these months	33% (−)	41%	46%	34%
I am able to take a holiday during these months	20% (−)	25%	35% (+)	43% (+)
I want to travel leveraging Chusok holiday	21%	17%	17%	25%
There are places in Canada I'd only want to visit during these months	25% (+)	18%	18%	33% (+)
There are less crowds at the places I want to visit during these months	19% (+)	18%	11%	21%
Travel prices are cheaper during these months	14%	17%	11%	24% (+)
There are specific activities I want to do in Canada that are available in these months	19% (+)	13%	9%	19% (+)
It's school holidays so I can enjoy a family trip	15% (+)	9%	4% (−)	23% (+)
I need to visit for business / work	7% (+)	4%	2%	7% (+)

➕ / ➖ = significantly higher/lower result (HEG vs. 2024 Total)

BARRIERS FOR FALL TRAVEL TO CANADA: BY SEGMENTS

Being unable to take a holiday during the Fall months is the biggest barrier for OEs, CSs, and RGs. RGs also place higher importance on travel being too expensive.

Legend:
- ■ Outdoor Explorers (dark green)
- ■ Culture Seekers (light blue)
- ■ Refined Globetrotters (dark red)

Barrier	Outdoor Explorers	Culture Seekers	Refined Globetrotters
I am unable to take a holiday during these months	35%	38%	41%
Travel prices are more expensive during these months	11% (−)	11%	29% (+)
The weather is not ideal at the places I want to visit during these months	17%	17%	17%
There are other places I'd rather visit during these months	21%	18%	12%
I don't know enough about what activities are available during these months	20% (+)	7%	11%
My kids are in school and I don't want them to miss class	20% (+)	6%	9%
There are too many crowds at the places I want to visit during these months	21% (+)	12%	10%
The activities I want to do are not available in these months	18% (+)	5%	3%

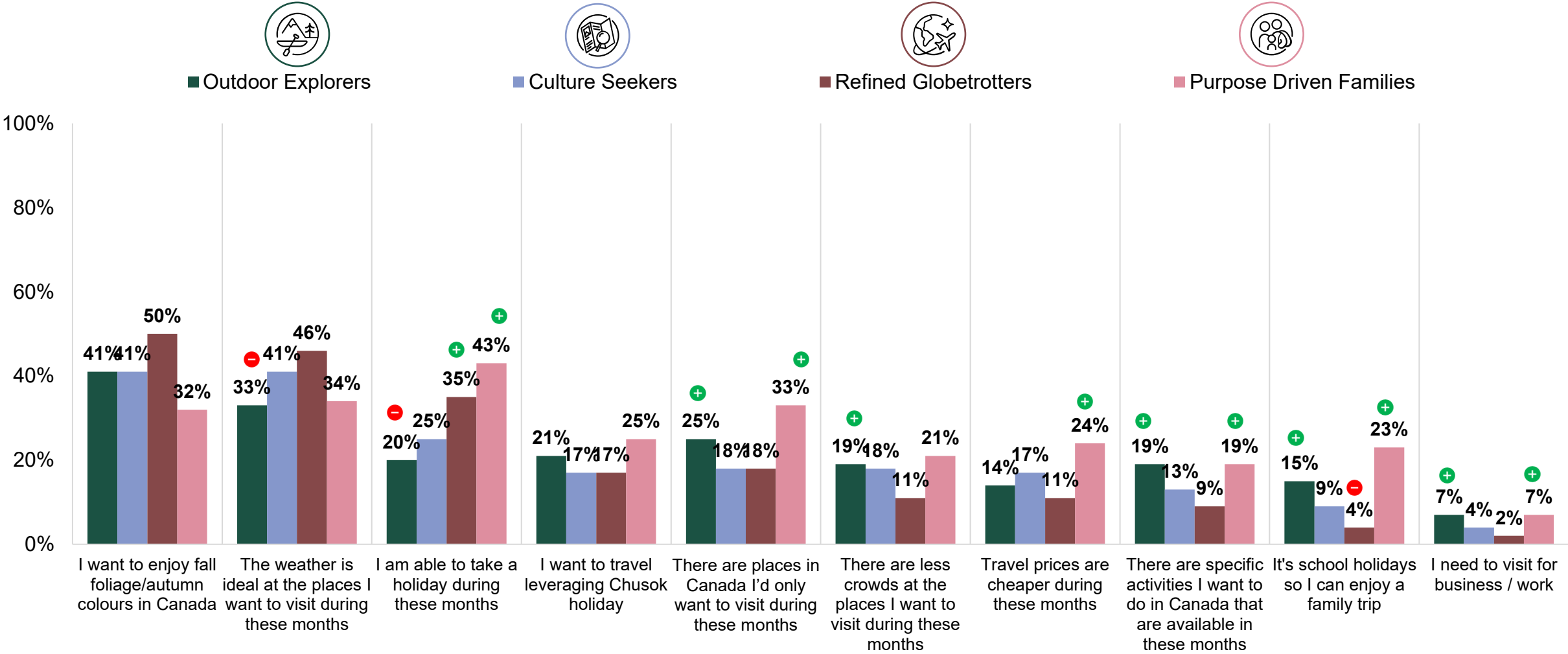*Purpose Driven Families base size too small to report (n=20**)*
Base: Those in the dream to purchase stages of the path to purchase for Canada and <u>not considering</u> visiting Canada or any province/territory in September, October or November: Outdoor Explorers (n=80); Culture Seekers (n=68); Refined Globetrotters (n=84); Purpose Driven Families (n=20**)
E7. You indicated earlier that you are not considering taking a holiday to **Canada** during the months of September, October and/or November… Which of the following describes why you would **not** be interested in travelling to Canada for a holiday during these **autumn months**?
**Base size too small to report (n<25)

➕ / ➖ = significantly higher/lower result (HEG vs. 2024 Total)

MOTIVATORS & BARRIERS FOR WINTER TRAVEL TO CANADA

DESTINATION CANADA

The cold weather remains the biggest deterrent to travelling to Canada in the Winter months, although it also appeals to those who want to travel during the Winter, along with being able to take a holiday during these months. Of note, mentions of there being other places they want to visit as a barrier has increased compared to last year.

Motivators for Winter Travel

■ 2024 (n=435) ■ 2023 (n=439)

Motivator	2024	2023
I am able to take a holiday during these months	42%	41%
The weather is ideal at the places I want to visit during these months	35%	35%
There are less crowds at the places I want to visit during these months	23%	18%
There are places in Canada I'd only want to visit during these months	22%	28%
There are specific activities I want to do in Canada that are available in these months	21%	21%
Travel prices are cheaper during these months	15%	19%
I need to visit for business / work	8%	n/a

Barriers for Winter Travel

■ 2024 (n=722) ■ 2023 (n=840)

Barrier	2024	2023
The weather is too cold at the places I want to visit during these months	41%	43%
I am unable to take a holiday during these months	26%	26%
Travel prices are more expensive during these months	21%	19%
There are other places I'd rather visit during these months	17% ↑	13%
I don't know enough about what activities are available during these months	10%	11%
The activities I want to do are not available in these months	9%	7%
There are too many crowds at the places I want to visit during these months	8%	10%
My kids are in school and I don't want them to miss class	6%	6%

South Korea GTRP – December 2024

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

MOTIVATORS FOR WINTER TRAVEL TO CANADA: BY SEGMENTS

DESTINATION CANADA

Being able to take a holiday is the biggest motivator for RGs and CSs, while ideal weather appeals more to OEs and PDFs.

■ Outdoor Explorers   ■ Culture Seekers   ■ Refined Globetrotters   ■ Purpose Driven Families

	Outdoor Explorers	Culture Seekers	Refined Globetrotters	Purpose Driven Families
I am able to take a holiday during these months	26% ⊖	47%	51%	44%
The weather is ideal at the places I want to visit during these months	44% ⊕	26%	32%	42%
There are less crowds at the places I want to visit during these months	33% ⊕	21%	18%	31%
There are places in Canada I'd only want to visit during these months	32% ⊕	19%	28%	19%
There are specific activities I want to do in Canada that are available in these months	24%	20%	18%	22%
Travel prices are cheaper during these months	25% ⊕	21%	9%	19%
I need to visit for business / work	11%	6%	6%	17%

South Korea GTRP – December 2024

49

⊕ / ⊖ = significantly higher/lower result (HEG vs. 2024 Total)

BARRIERS FOR WINTER TRAVEL TO CANADA: BY SEGMENTS

The cold weather is the biggest deterrent to RGs, OEs, and CSs, while PDFs are more likely to say travel prices being expensive as a barrier.

- ■ Outdoor Explorers
- ■ Culture Seekers
- ■ Refined Globetrotters
- ■ Purpose Driven Families

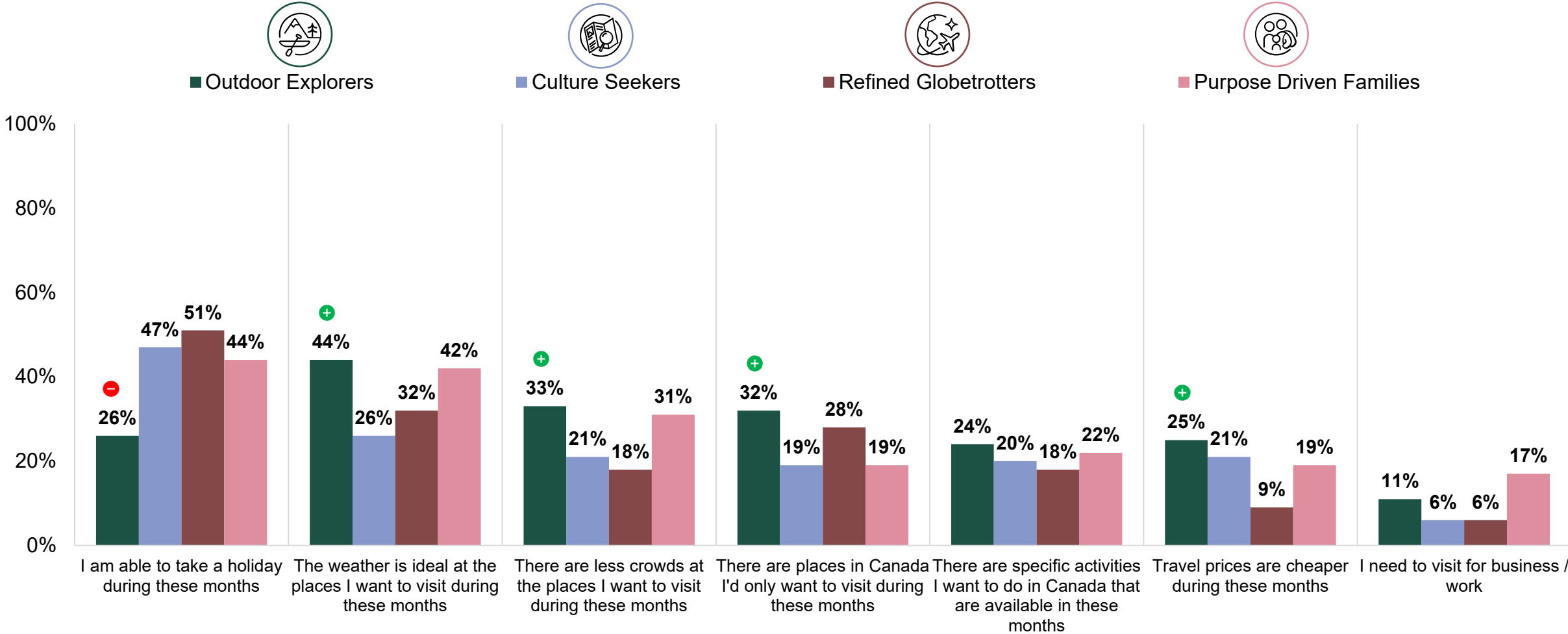|	Outdoor Explorers	Culture Seekers	Refined Globetrotters	Purpose Driven Families
The weather is too cold at the places I want to visit during these months	35%	49%	48% ⊕	27%
I am unable to take a holiday during these months	18% ⊖	23%	31%	19%
Travel prices are more expensive during these months	20%	17%	20%	32%
There are other places I'd rather visit during these months	24% ⊕	21%	12%	16%
I don't know enough about what activities are available during these months	17% ⊕	13%	8%	16%
The activities I want to do are not available in these months	12%	21% ⊕	6%	16%
There are too many crowds at the places I want to visit during these months	12%	8%	6%	22% ⊕
My kids are in school and I don't want them to miss class	11% ⊕	8%	2% ⊖	18% ⊕

Base: Those in the dream to purchase stages of the path to purchase for Canada and not considering visiting Canada or any province/territory in December, January or February:
Outdoor Explorers (n=136); Culture Seekers (n=122); Refined Globetrotters (n=155); Purpose Driven Families (n=36*)
E9. You indicated earlier that you are not considering taking a holiday to **Canada** during the months of December, January and/or February… Which of the following describes why you would **not** be interested in travelling to Canada for a holiday during these **winter months**?
*Small base size, interpret with caution (n<50)

⊕ / ⊖ = significantly higher/lower result (HEG vs. 2024 Total)

MOST RECENT TRIP

MAIN PURPOSE OF RECENT TRIP

One-half of South Korean travellers to Canada went for a holiday, on similar to last year and on par with HEGs.

Total Travellers to Canada: Trended
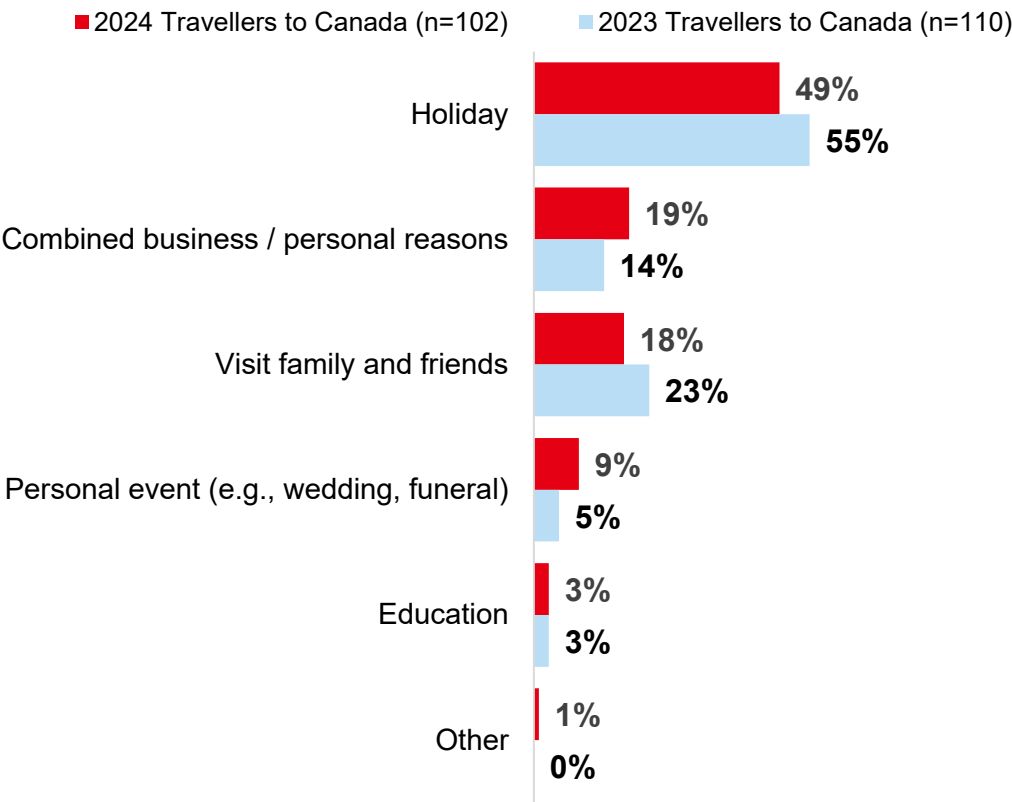
■ 2024 Travellers to Canada (n=102)　　■ 2023 Travellers to Canada (n=110)

Purpose	2024	2023
Holiday	49%	55%
Combined business / personal reasons	19%	14%
Visit family and friends	18%	23%
Personal event (e.g., wedding, funeral)	9%	5%
Education	3%	3%
Other	1%	0%

Total Travellers to Canada vs. HEG Travellers to Canada

■ Travellers to Canada (n=102)　　■ HEG Travellers to Canada (n=79)

Purpose	Travellers	HEG
Holiday	49%	49%
Combined business / personal reasons	19%	20%
Visit family and friends	18%	15%
Personal event (e.g., wedding, funeral)	9%	10%
Education	3%	4%
Other	1%	2%
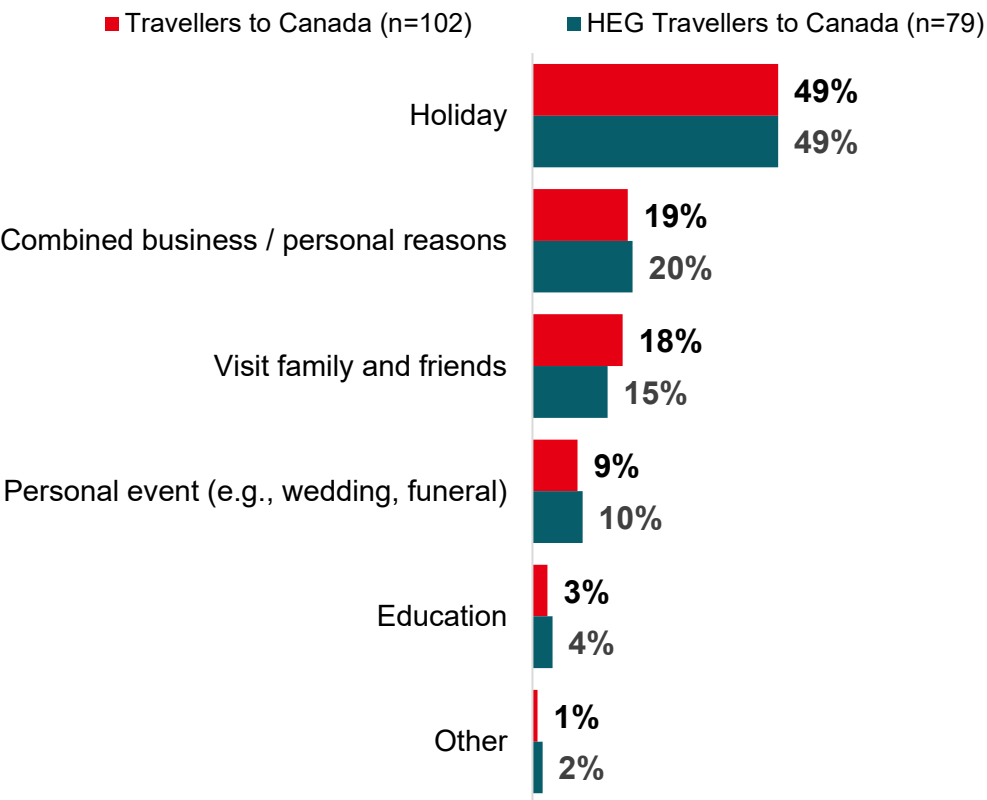
↑ / ↓ = significantly higher/lower result (2024 vs. 2023)
➕ / ➖ = significantly higher/lower result (HEG vs. 2024 Total)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
F2. What was the main purpose of this trip? (Select one)

MAIN PURPOSE OF RECENT TRIP: BY DESTINATION

The main purpose of a recent trip to Canada was for leisure but to a lesser degree compared to travellers to other destinations. Trips to Canada were more likely to have a business component.

■ Travellers to Canada (n=102)   ■ Travellers to Any Destination (excl. CA) (n=401)

Category	Travellers to Canada	Travellers to Any Destination (excl. CA)
Holiday	⊖ 49%	63%
Combined business / personal reasons	⊕ 19%	9%
Visit family and friends	18%	15%
Personal event (e.g., wedding, funeral)	9%	6%
Education	3%	5%
Other	1%	1%

⊕ / ⊖ = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
F2. What was the main purpose of this trip? (Select one)

South Korea GTRP – December 2024

Nahanni National Park Reserves
Northwest Territories

NIGHTS SPENT DURING RECENT TRIP

The majority of travellers spent 4-13 nights in Canada, similar among HEGs.

Total Travellers to Canada: Trended

- ■ 2024 Travellers to Canada (n=102)
- ■ 2023 Travellers to Canada (n=110)

1-3 nights
- 17%
- 19%

4-13 nights
- 80%
- 78%

14+ nights
- 4%
- 3%

Total Travellers to Canada vs. HEG Travellers to Canada

- ■ Travellers to Canada (n=102)
- ■ HEG Travellers to Canada (n=79)

1-3 nights
- 17%
- 17%

4-13 nights
- 80%
- 81%
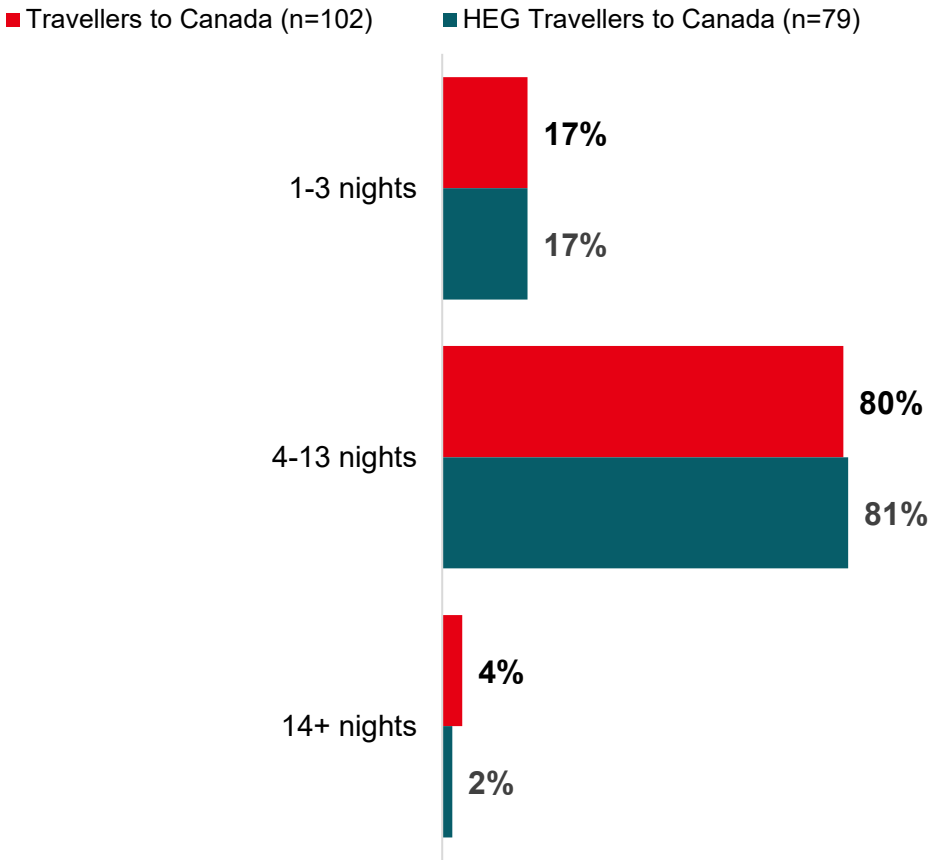
14+ nights
- 4%
- 2%

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

⊕ / ⊖ = significantly higher/lower result (HEG vs. 2024 Total)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
F4. How many nights did you spend in this destination?

NIGHTS SPENT DURING RECENT TRIP: BY DESTINATION

The length of stay was similar, regardless of the destination.

■ Travellers to Canada (n=102)   ■ Travellers to Any Destination (excl. CA) (n=401)

	1-3 nights	4-13 nights	14+ nights
Travellers to Canada	17%	80%	4%
Travellers to Any Destination (excl. CA)	21%	73%	6%

➕ / ➖ = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
F4. How many nights did you spend in this destination?

Barren Canyon, Algonquin Park
Ontario

South Korea GTRP – December 2024

55

TRAVEL PARTY OF RECENT TRIP

Six in ten travellers to Canada were accompanied by a spouse or partner, an increase compared to last year.

Total Travellers to Canada: Trended

■ 2024 Travellers to Canada (n=102)   ■ 2023 Travellers to Canada (n=110)

Travel Party	
Spouse or partner	59% ↑ / 38%
Child (under 18 years old)	26% / 20%
Friend(s)	17% / 18%
Child (18 years old or older)	16% / 11%
Parent(s)	13% / 19%
Business associates or colleagues	9% / 9%
Alone/solo	7% / 13%
Grandparent(s)	3% / 2%
Other family members	8% / 9%
Other	1% / 0%

Spouse/Partner ONLY
2024 Total Canada: 23%
2023 Total Canada: 18%

Total Travellers to Canada vs. HEG Travellers to Canada

■ Travellers to Canada (n=102)   ■ HEG Travellers to Canada (n=79)

Travel Party	
Spouse or partner	59% / 59%
Child (under 18 years old)	26% / 30%
Friend(s)	17% / 20%
Child (18 years old or older)	16% / 14%
Parent(s)	13% / 10%
Business associates or colleagues	9% / 8%
Alone/solo	7% / 9%
Grandparent(s)	3% / 3%
Other family members	8% / 5% ⊖
Other	1% / 1%

Spouse/Partner ONLY
Total Canada: 23%
HEG Canada: 23%

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

⊕ / ⊖ = significantly higher/lower result (HEG vs. 2024 Total)

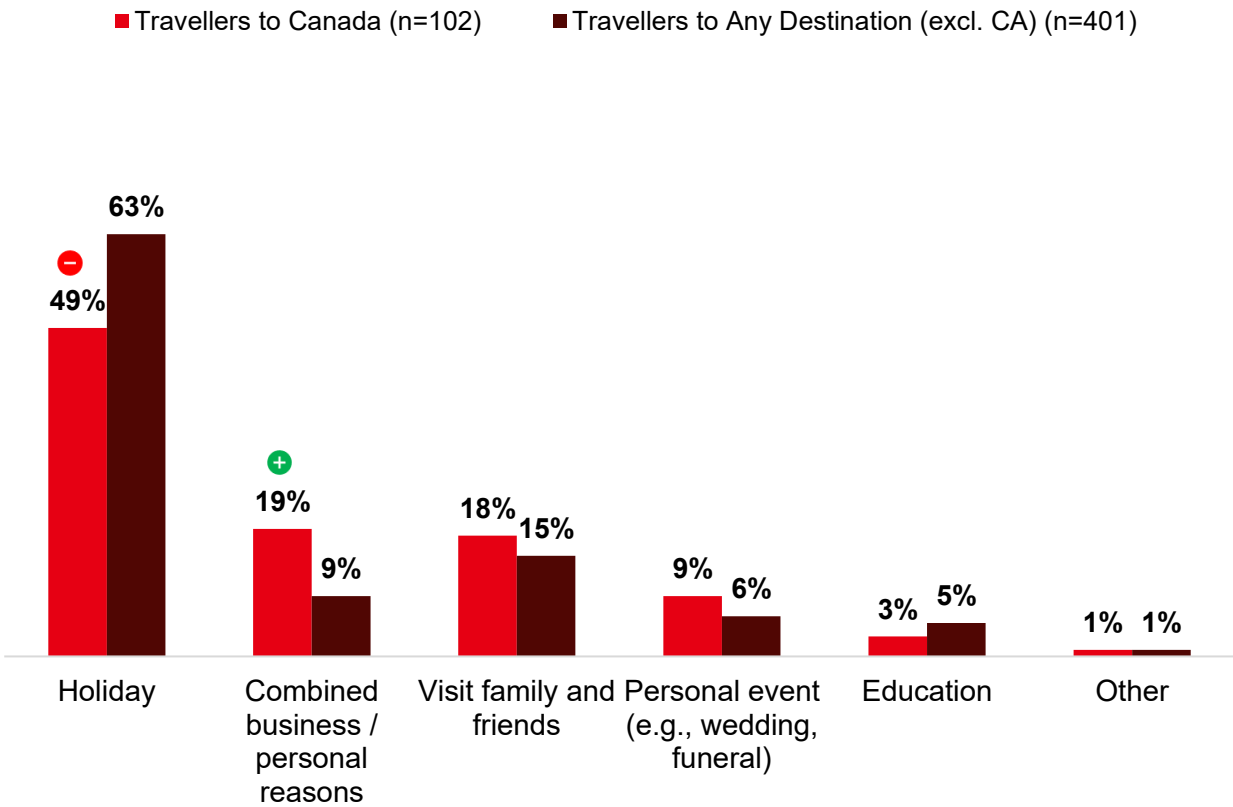Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
F5. With whom did you travel on this trip? (Select all that apply)

TRAVEL PARTY OF RECENT TRIP: BY DESTINATION

Travellers to Canada were more likely to travel with a spouse or partner or children under 18 compared to travellers to other destinations.

■ Travellers to Canada (n=102)　　■ Travellers to Any Destination (excl. CA) (n=401)

Travel Party	Travellers to Canada	Travellers to Any Destination (excl. CA)
Spouse or partner	59% ⊕	46%
Child (under 18 years old)	26% ⊕	12%
Friend(s)	17%	21%
Child (18 years old or older)	16%	14%
Parent(s)	13%	12%
Business associates or colleagues	9%	5%
Alone/solo	7%	12%
Grandparent(s)	3%	1%
Other family members	8%	10%
Other	1%	0%
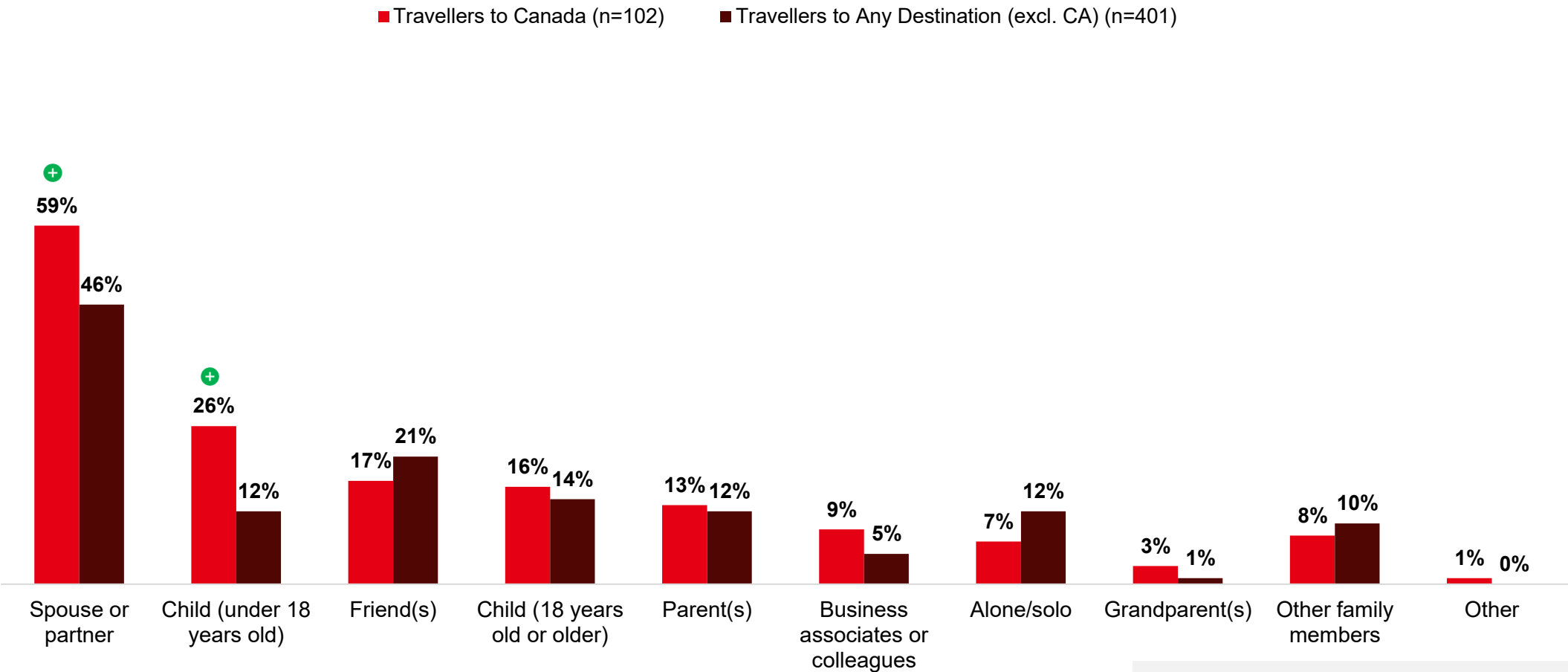
Spouse/Partner ONLY
Travellers to Canada: 23%
Travellers to Any Destination (excl. CA): 23%

⊕ / ⊖ = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
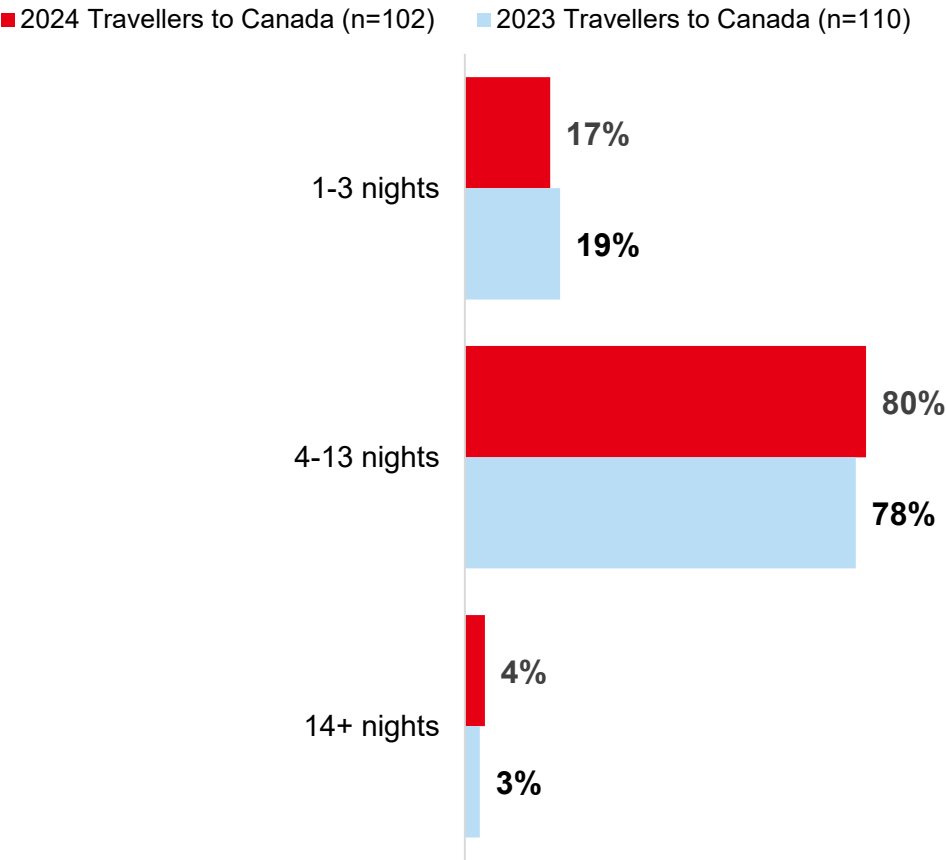F5. With whom did you travel on this trip? (Select all that apply)

TRAVEL AGENTS/TOUR OPERATOR USAGE FOR RECENT TRIP

Usage of travel agents or tour operators and their primary use cases remain consistent with last year overall and similar among HEGs.

% Used a travel agent
2024 Total Canada: 71%
2023 Total Canada: 65%

Total Travellers to Canada: Trended
Among those who used a travel agent/tour operator

% Used a travel agent
Total Canada: 71%
HEG Canada: 72%

Total Travellers to Canada vs. HEG Travellers to Canada
Among those who used a travel agent/tour operator

■ 2024 Travellers to Canada (n=72)   ■ 2023 Travellers to Canada (n=73)

■ Travellers to Canada (n=72)   ■ HEG Travellers to Canada (n=58)

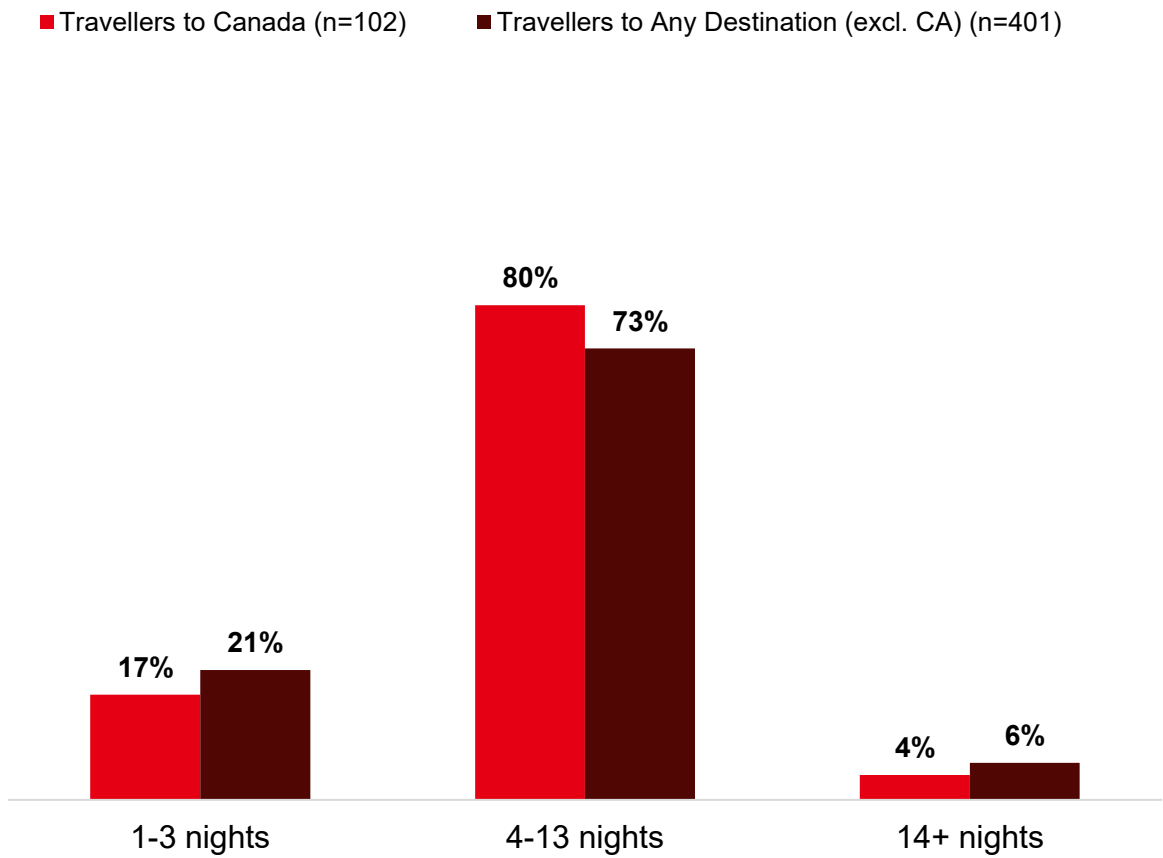|	2024	2023		HEG
Booking flights	57%	51%	57%	59%
Researching accommodations	55%	49%	55%	53%
Researching flights	55%	54%	55%	53%
Booking accommodations	52%	51%	52%	53%
Booking activities to see and do	32%	30%	32%	36%
Researching potential travel destinations	32%	40%	32%	36%
Researching activities to see and do	30%	29%	30%	33%
Researching ground transportation	22%	36%	22%	22%
Booking ground transportation	18%	16%	18%	16%

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

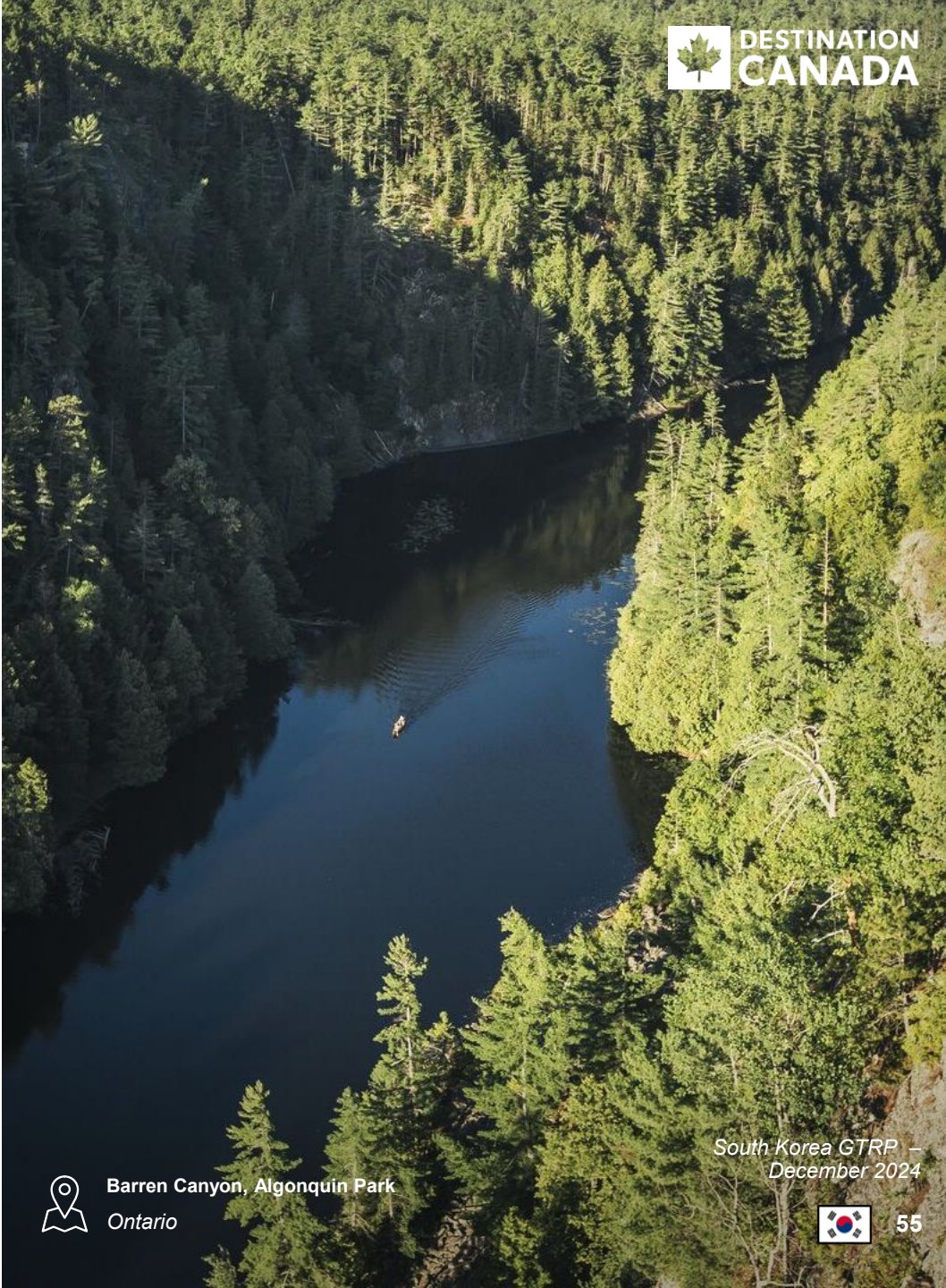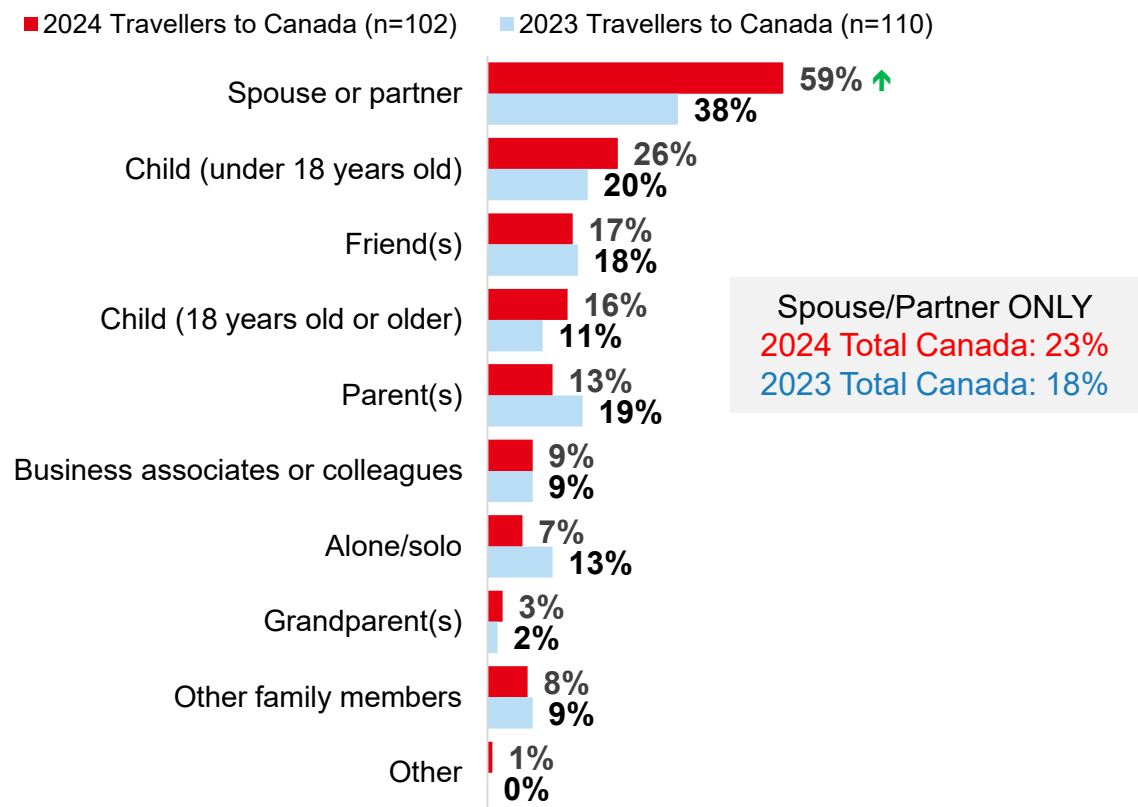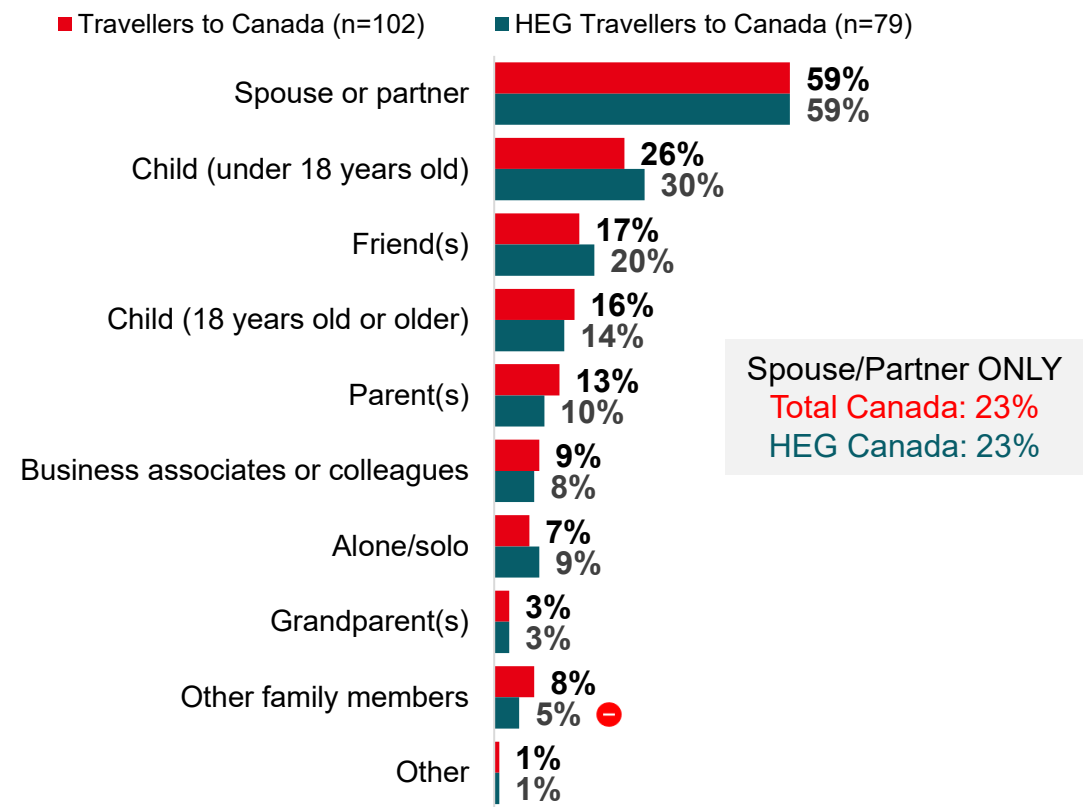➕ / ➖ = significantly higher/lower result (HEG vs. 2024 Total)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
F9. Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their travel schedules, from purchasing tour packages to booking flights and hotels. Examples of travel agents include Hanatour or Interpark / Hanatour or Lotte Tour for code 2/3, they do not include online booking engines like Skyscanner or NAVER Flight. Did you use a travel agent or tour operator to help you research or book your trip? (Select one)
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years, Used a Travel Agent/Tour Operator
F10. Which of the following did a travel agent or tour operator help you with?

TRAVEL AGENTS/TOUR OPERATOR USAGE FOR RECENT TRIP: BY DESTINATION (AMONG THOSE WHO USED A TRAVEL AGENT/TOUR OPERATOR)

Travel agent or tour operators were used more frequently by travellers to Canada compared to other destinations.

% Used a travel agent
Travellers to Canada: 71% ➕
Travellers to Any Destination (excl. CA): 59%

Legend:
- 🟥 Travellers to Canada (n=72)
- 🟥 Travellers to Any Destination (excl. CA) (n=237)

Category	Travellers to Canada	Travellers to Any Destination (excl. CA)
Booking flights	57%	57%
Researching accommodations	55%	51%
Researching flights	55%	51%
Booking accommodations	52%	56%
Booking activities to see and do	32%	26%
Researching potential travel destinations	32%	26%
Researching activities to see and do	30%	24%
Researching ground transportation	22%	20%
Booking ground transportation	18%	21%

➕ / ➖ = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
F9. Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their travel schedules, from purchasing tour packages to booking flights and hotels. Examples of travel agents include Hanatour or Interpark / Hanatour or Lotte Tour for code 2/3, they do not include online booking engines like Skyscanner or NAVER Flight. Did you use a travel agent or tour operator to help you research or book your trip? (Select one)
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years, Used a Travel Agent/Tour Operator
F10. Which of the following did a travel agent or tour operator help you with?

South Korea GTRP – December 2024

Twin Falls Lodge
Saskatchewan

59

ORGANIZED GROUP TOUR USAGE FOR RECENT TRIP

Usage of organized group tours remains consistent with last year for travellers to Canada. HEGs are slightly more likely to use one for at least a part of their trip compared to total travellers to Canada.

Total Travellers to Canada: Trended
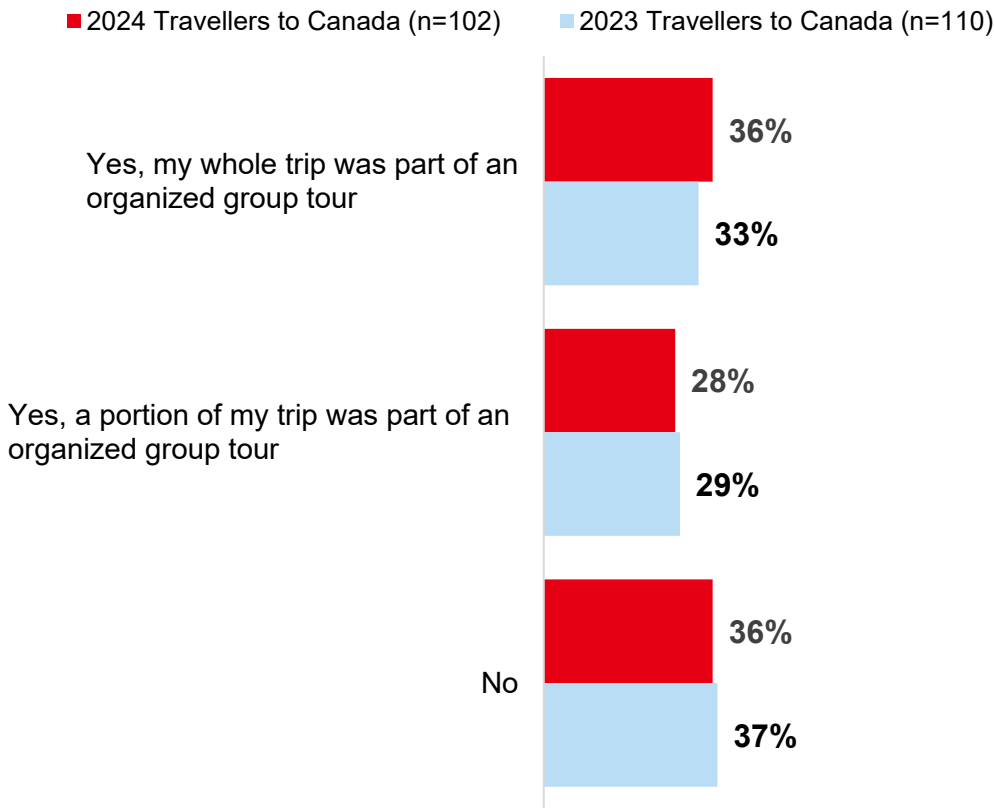
- ■ 2024 Travellers to Canada (n=102)
- ■ 2023 Travellers to Canada (n=110)

Yes, my whole trip was part of an organized group tour
- 36%
- 33%

Yes, a portion of my trip was part of an organized group tour
- 28%
- 29%

No
- 36%
- 37%

Total Travellers to Canada vs. HEG Travellers to Canada

- ■ Travellers to Canada (n=102)
- ■ HEG Travellers to Canada (n=79)

Yes, my whole trip was part of an organized group tour
- 36%
- 39%

Yes, a portion of my trip was part of an organized group tour
- 28%
- 31%

No
- 36%
- 30% ⊖

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

⊕ / ⊖ = significantly higher/lower result (HEG vs. 2024 Total)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
F11. An organized group tour consists of a package where any combination of accommodation, transportation, food and/or activities are included as a multi-day itinerary. Did you travel as a part of an organized group tour on this trip?

ORGANIZED GROUP TOUR FOR RECENT TRIP: BY DESTINATION

At least one-half of travellers to any destination have used an organized group tour for at least part of their trip.

■ Travellers to Canada (n=102)　　■ Travellers to Any Destination (excl. CA) (n=401)

	Yes, my whole trip was part of an organized group tour	Yes, a portion of my trip was part of an organized group tour	No
Travellers to Canada	36%	28%	36%
Travellers to Any Destination (excl. CA)	31%	26%	42%

➕ / ➖ = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
F11. An organized group tour consists of a package where any combination of accommodation, transportation, food and/or activities are included as a multi-day itinerary. Did you travel as a part of an organized group tour on this trip?

South Korea GTRP – December 2024
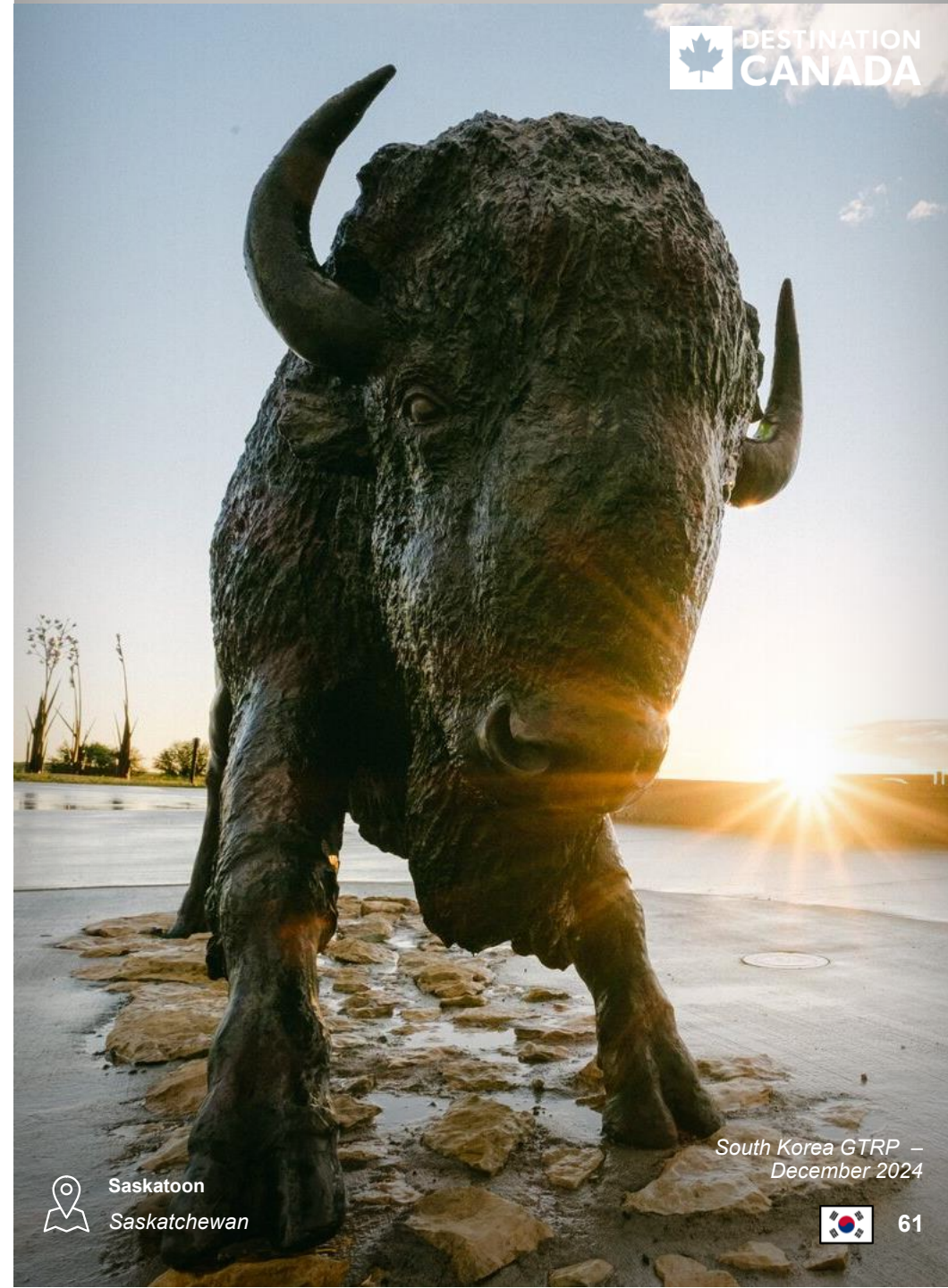
Saskatoon
Saskatchewan

61

BOOKING FLIGHTS FOR RECENT TRIP

Using a travel agent or tour operator remains the most popular method for booking flights, and this is even higher among HEGs, particularly booking online. Of note, booking on the phone with a travel agent/tour operator has decreased compared to last year.

Total Travellers to Canada: Trended

■ 2024 Travellers to Canada (n=102)　■ 2023 Travellers to Canada (n=110)

Travel agent/tour operator (NET)	63% / 63%
Booked online with a travel agent/tour operator (e.g. Hanatour or Interpark)	42% / 39%
Booked in-person with a travel agent/tour operator (e.g. Hanatour or Lotte Tour)	21% / 15%
Booked on the phone with a travel agent/tour operator (e.g. Hanatour or Lotte Tour)	15% ↓ / 27%
Booked online through an online booking engine (e.g. Skyscanner or NAVER Flight)	32% / 33%
Booked directly with the airline(s)	31% / 31%
Booked by someone else in the travel party	7% / 11%
Did not need to book any flights	1% / 1%

Total Travellers to Canada vs. HEG Travellers to Canada

■ Travellers to Canada (n=102)　■ HEG Travellers to Canada (n=79)

Travel agent/tour operator (NET)	63% / 69% ⊕
Booked online with a travel agent/tour operator (e.g. Hanatour or Interpark)	42% / 48% ⊕
Booked in-person with a travel agent/tour operator (e.g. Hanatour or Lotte Tour)	21% / 22%
Booked on the phone with a travel agent/tour operator (e.g. Hanatour or Lotte Tour)	15% / 14%
Booked online through an online booking engine (e.g. Skyscanner or NAVER Flight)	32% / 28%
Booked directly with the airline(s)	31% / 25% ⊖
Booked by someone else in the travel party	7% / 7%
Did not need to book any flights	1% / 1%

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

⊕ / ⊖ = significantly higher/lower result (HEG vs. 2024 Total)

South Korea GTRP – December 2024

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
F12. How did you book your <u>flight</u> for this trip? (Select all that apply)

BOOKING FLIGHTS FOR RECENT TRIP: BY DESTINATION

Travellers to Canada are more likely to book flights with a travel agent or tour operator, particularly in-person, compared to travellers to other destinations.

■ Travellers to Canada (n=102)　■ Travellers to Any Destination (excl. CA) (n=401)

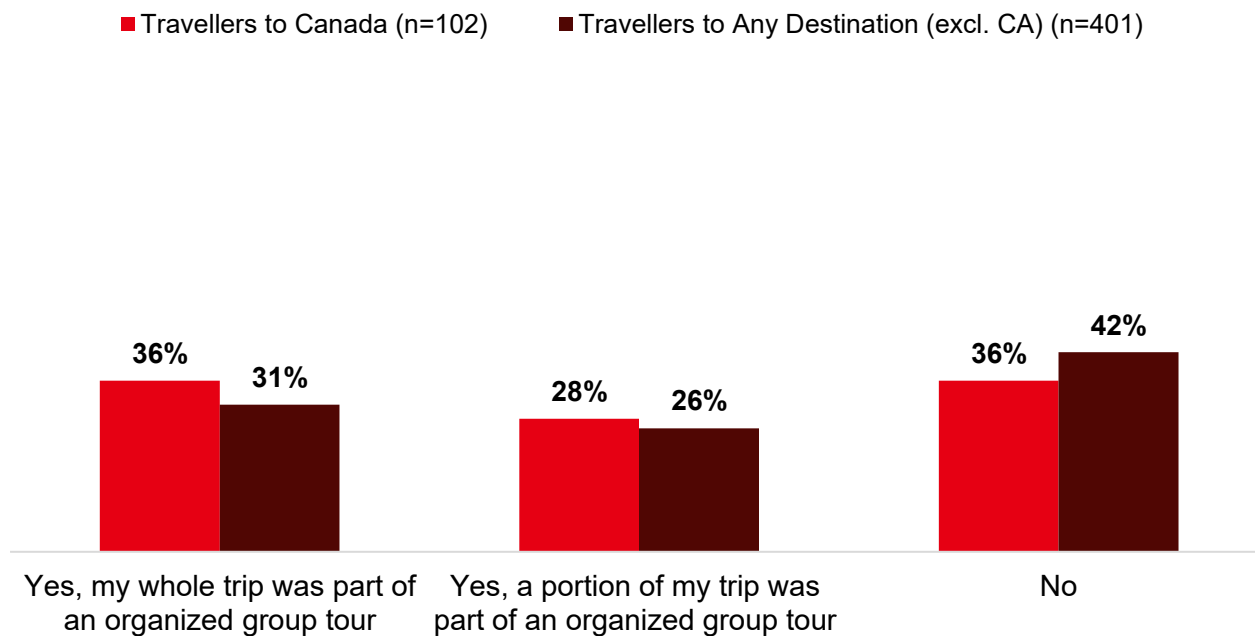|	Travel agent/tour operator (NET)	Booked online with a travel agent/tour operator (e.g. Hanatour or Interpark)	Booked in-person with a travel agent/tour operator (e.g. Hanatour or Lotte Tour)	Booked on the phone with a travel agent/tour operator (e.g. Hanatour or Lotte Tour)	Booked online through an online booking engine (e.g. Skyscanner or NAVER Flight)	Booked directly with the airline(s)	Booked by someone else in the travel party	Did not need to book any flights
Travellers to Canada	63%	42%	21%	15%	32%	31%	7%	1%
Travellers to Any Destination	50%	37%	10%	12%	36%	26%	8%	3%

➕ / ➖ = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
F12. How did you book your flight for this trip? (Select all that apply)

South Korea GTRP – December 2024

Montmorency Falls Park, Quebec City
Quebec

63

BOOKING ACCOMMODATIONS FOR RECENT TRIP

Similar to flights, travellers to Canada were most likely to use a travel agent or tour operator to book accommodations. HEGs are even more likely to use a travel agent or tour operator.

Total Travellers to Canada: Trended

■ 2024 Travellers to Canada (n=102) ■ 2023 Travellers to Canada (n=110)

Category	2024	2023
Travel agent/tour operator (NET)	57%	52%
Booked online with a travel agent/tour operator (e.g. Hanatour or Interpark)	35%	36%
Booked in-person with a travel agent/tour operator (e.g. Hanatour or Lotte Tour)	18%	16%
Booked on the phone with a travel agent/tour operator (e.g. Hanatour or Lotte Tour)	14%	16%
Booked online through an online booking engine (e.g. Skyscanner or NAVER Flight)	30%	25%
Booked through accommodation sharing services website (e.g. Airbnb)	25%	25%
Booked directly with the lodging/ accommodation establishment	13% ↓	25%
Booked through a visitors information centre at the destination	10%	10%
Booked by someone else in the travel party	8% ↑	2%
Did not need to book any accommodation	3%	1%

Total Travellers to Canada vs. HEG Travellers to Canada

■ Travellers to Canada (n=102) ■ HEG Travellers to Canada (n=79)

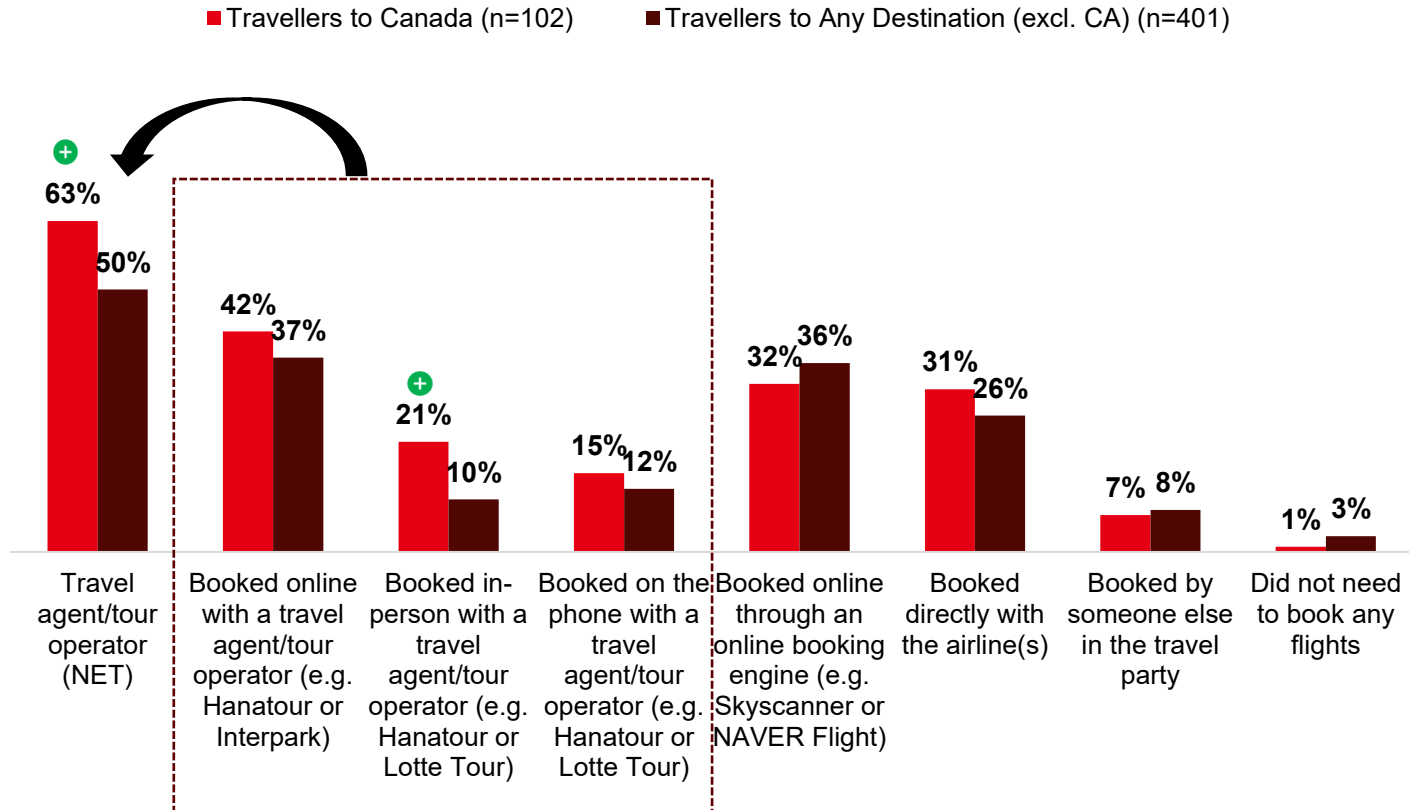| Category	Travellers	HEG
Travel agent/tour operator (NET)	57%	62% ➕
Booked online with a travel agent/tour operator (e.g. Hanatour or Interpark)	35%	38%
Booked in-person with a travel agent/tour operator (e.g. Hanatour or Lotte Tour)	18%	22%
Booked on the phone with a travel agent/tour operator (e.g. Hanatour or Lotte Tour)	14%	15%
Booked online through an online booking engine (e.g. Skyscanner or NAVER Flight)	30%	26%
Booked through accommodation sharing services website (e.g. Airbnb)	25%	26%
Booked directly with the lodging/ accommodation establishment	13%	9% ➖
Booked through a visitors information centre at the destination	10%	7% ➖
Booked by someone else in the travel party	8%	9%
Did not need to book any accommodation	3%	1% ➖

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

➕ / ➖ = significantly higher/lower result (HEG vs. 2024 Total)

South Korea GTRP – December 2024

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
F13. How did you book your accommodation for this trip? (Select all that apply)

TYPE OF ACCOMMODATIONS FOR RECENT TRIP: BY DESTINATION

Usage of a travel agent or tour operator are the top methods for booking accommodations for any destination; however, travellers to Canada are more likely to book in-person with a travel agent or tour operator.

■ Travellers to Canada (n=102)   ■ Travellers to Any Destination (excl. CA) (n=401)

Category	Travellers to Canada	Travellers to Any Destination (excl. CA)
Travel agent/tour operator (NET)	57%	48%
Booked online with a travel agent/tour operator (e.g. Hanatour or Interpark)	35%	33%
Booked in-person with a travel agent/tour operator (e.g. Hanatour or Lotte Tour)	18%	10%
Booked on the phone with a travel agent/tour operator (e.g. Hanatour or Lotte Tour)	14%	10%
Booked online through an online booking engine (e.g. Skyscanner or NAVER Flight)	30%	30%
Booked through accommodation sharing services website (e.g. Airbnb)	25%	26%
Booked directly with the lodging/accommodation establishment	13%	17%
Booked through a visitors information centre at the destination	10%	6%
Booked by someone else in the travel party	8%	8%
Did not need to book any accommodation	3%	5%

➕ / ➖ = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years
F13. How did you book your accommodation for this trip? (Select all that apply)

TYPE OF ACCOMMODATIONS FOR RECENT TRIP

Stays at a mid-priced hotel/motel and luxury hotels remain the most popular type of accommodations for travellers to Canada, and among HEGs.

Total Travellers to Canada: Trended

■ 2024 Travellers to Canada (n=99)   ■ 2023 Travellers to Canada (n=109)

Accommodation	2024	2023
Mid-priced hotel / motel	49%	45%
Luxury hotel	38%	40%
Rented house, apartment or condominium (e.g., Airbnb)	16%	9%
All-inclusive resort	15%	10%
Home of friends or relatives	13%	17%
Unique accommodation (e.g. treehouse, tiny homes, eco-domes, etc.)	12%	10%
Guest ranch, farm, or lodge	11%	10%
Budget hotel / motel	10%	12%
Hostel, university or school dormitory	8%	11%
Camping or trailer park	7%	7%
Bed & Breakfast (B&B)	5%	8%
Glamping (e.g. camping with comfortable amenities and, in some cases, resort-style services or catering)	4%	12%
Own cottage or second home	3%	9%

Total Travellers to Canada vs. HEG Travellers to Canada

■ Travellers to Canada (n=99)   ■ HEG Travellers to Canada (n=78)

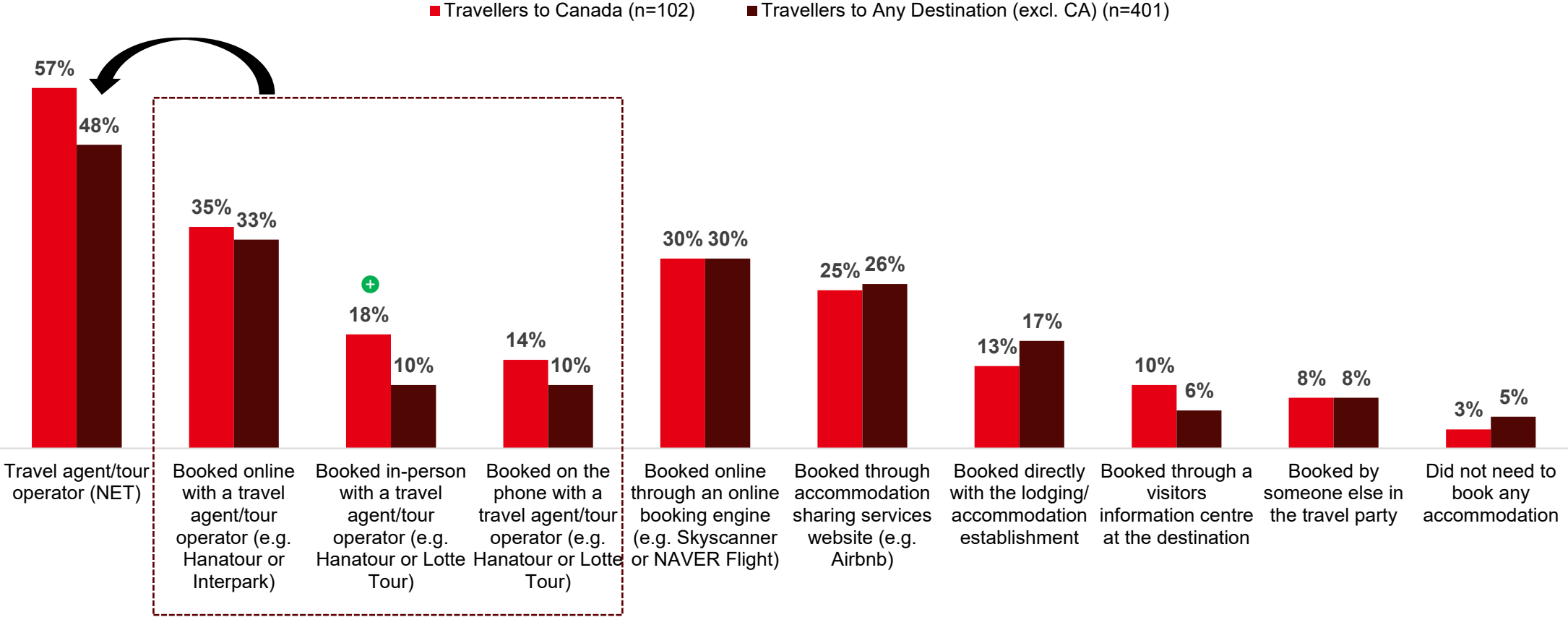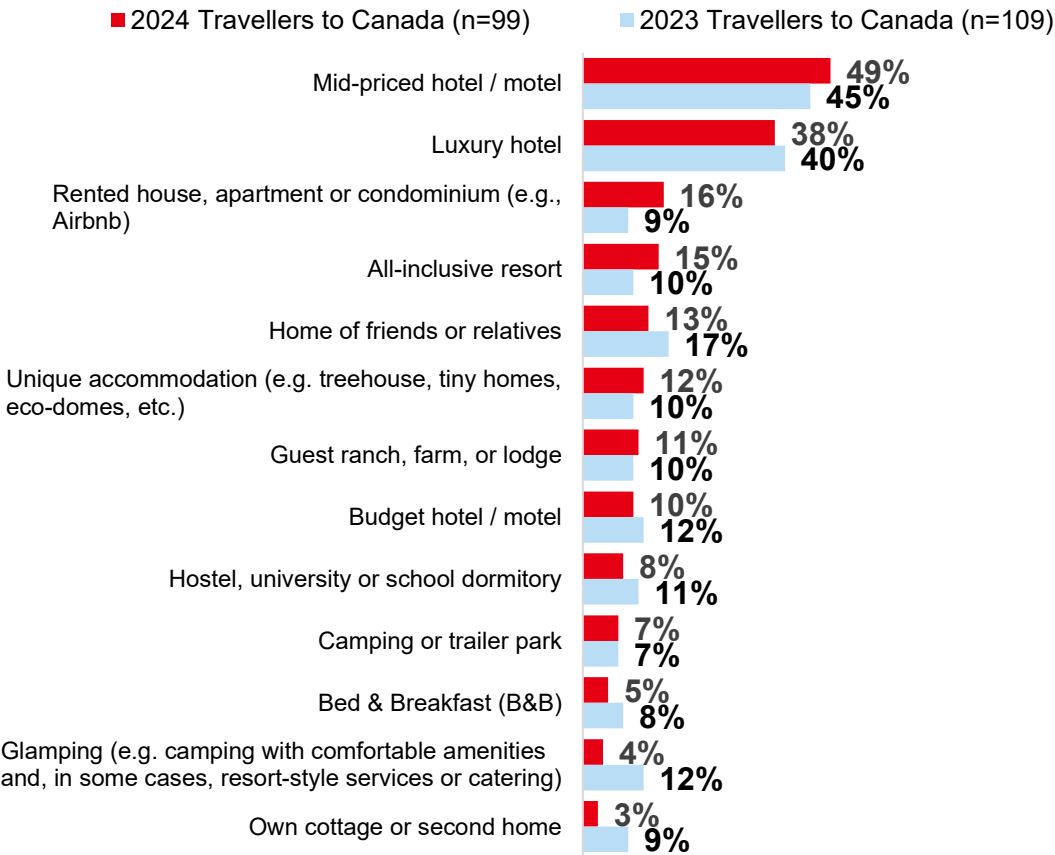| Accommodation	Travellers	HEG
Mid-priced hotel / motel	49%	46%
Luxury hotel	38%	42%
Rented house, apartment or condominium (e.g., Airbnb)	16%	17%
All-inclusive resort	15%	16%
Home of friends or relatives	13%	9% ⊖
Unique accommodation (e.g. treehouse, tiny homes, eco-domes, etc.)	12%	9%
Guest ranch, farm, or lodge	11%	11%
Budget hotel / motel	10%	9%
Hostel, university or school dormitory	8%	6%
Camping or trailer park	7%	6%
Bed & Breakfast (B&B)	5%	4%
Glamping (e.g. camping with comfortable amenities and, in some cases, resort-style services or catering)	4%	5%
Own cottage or second home	3%	1%

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

⊕ / ⊖ = significantly higher/lower result (HEG vs. 2024 Total)

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years, Booked Accommodations
F14. Which type of accommodation did you stay in during this trip? (Select all that apply)
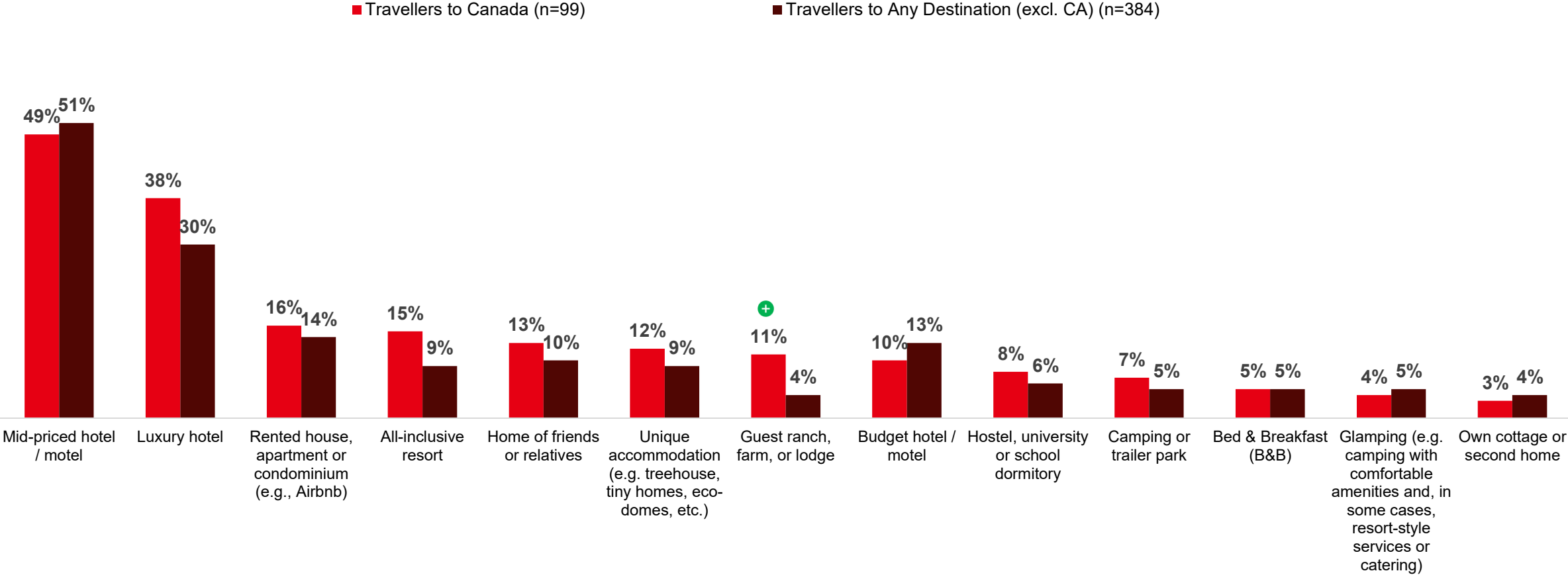
TYPE OF ACCOMMODATIONS FOR RECENT TRIP: BY DESTINATION

Mid-priced hotels/motels, followed by luxury hotels were the most popular accommodations for travellers to Canada and for those travelling to other destinations.

■ Travellers to Canada (n=99)　　　　■ Travellers to Any Destination (excl. CA) (n=384)

Accommodation type	Travellers to Canada	Travellers to Any Destination (excl. CA)
Mid-priced hotel / motel	49%	51%
Luxury hotel	38%	30%
Rented house, apartment or condominium (e.g., Airbnb)	16%	14%
All-inclusive resort	15%	9%
Home of friends or relatives	13%	10%
Unique accommodation (e.g. treehouse, tiny homes, eco-domes, etc.)	12%	9%
Guest ranch, farm, or lodge	11% ⊕	4%
Budget hotel / motel	10%	13%
Hostel, university or school dormitory	8%	6%
Camping or trailer park	7%	5%
Bed & Breakfast (B&B)	5%	5%
Glamping (e.g. camping with comfortable amenities and, in some cases, resort-style services or catering)	4%	5%
Own cottage or second home	3%	4%

⊕ / ⊖ = significantly higher/lower result (Travellers to Canada vs. Any Destination (excl. CA))
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years, Booked Accommodations
F14. Which type of accommodation did you stay in during this trip? (Select all that apply)

RECENT TRIP TO CANADA

St. Lunaire-Griquet
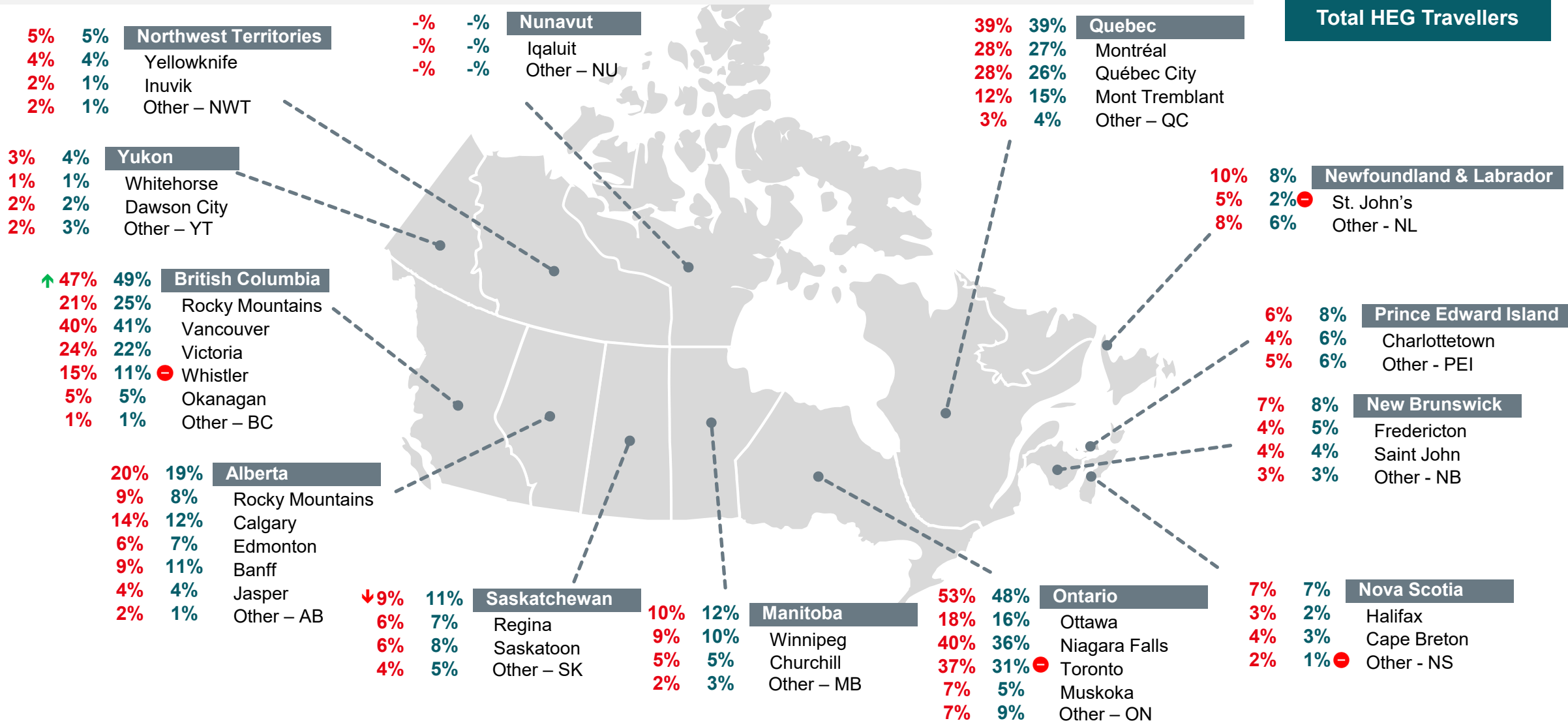*Newfoundland and Labrador*

CANADIAN DESTINATIONS VISITED DURING RECENT TRIP

South Korean travellers were most likely to have visited Ontario and BC on their most recent trip, with visits to BC increasing compared to last year.

Total Travellers

Total HEG Travellers

Northwest Territories
5%	5%	
4%	4%	Yellowknife
2%	1%	Inuvik
2%	1%	Other – NWT

Nunavut
-%	-%	
-%	-%	Iqaluit
-%	-%	Other – NU

Quebec
39%	39%	
28%	27%	Montréal
28%	26%	Québec City
12%	15%	Mont Tremblant
3%	4%	Other – QC

Yukon
3%	4%	
1%	1%	Whitehorse
2%	2%	Dawson City
2%	3%	Other – YT

Newfoundland & Labrador
10%	8%	
5%	2% ⊖	St. John's
8%	6%	Other - NL

British Columbia
↑ 47%	49%	
21%	25%	Rocky Mountains
40%	41%	Vancouver
24%	22%	Victoria
15%	11% ⊖	Whistler
5%	5%	Okanagan
1%	1%	Other – BC

Prince Edward Island
6%	8%	
4%	6%	Charlottetown
5%	6%	Other - PEI

New Brunswick
7%	8%	
4%	5%	Fredericton
4%	4%	Saint John
3%	3%	Other - NB

Alberta
20%	19%	
9%	8%	Rocky Mountains
14%	12%	Calgary
6%	7%	Edmonton
9%	11%	Banff
4%	4%	Jasper
2%	1%	Other – AB

Saskatchewan
↓ 9%	11%	
6%	7%	Regina
6%	8%	Saskatoon
4%	5%	Other – SK

Manitoba
10%	12%	
9%	10%	Winnipeg
5%	5%	Churchill
2%	3%	Other – MB

Ontario
53%	48%	
18%	16%	Ottawa
40%	36%	Niagara Falls
37%	31% ⊖	Toronto
7%	5%	Muskoka
7%	9%	Other – ON

Nova Scotia
7%	7%	
3%	2%	Halifax
4%	3%	Cape Breton
2%	1% ⊖	Other - NS

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada (n=102); HEG (n=79)
F17. Which of the following Canadian provinces or territories did you visit on this trip? (Select all that apply)
F18a-m. Within [PROVINCE], which travel destinations did you visit? (Select all that apply)

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)   ➕ / ➖ = significantly higher/lower result (HEG vs. 2024 Total)

CANADIAN DESTINATIONS VISITED DURING RECENT TRIP: BY KEY CANADIAN CITIES VISITED

South Korean travellers that recently travelled to Canada visited were most likely to also visit BC, Ontario or Quebec on the same trip.

	Canadian Cities Visited on Most Recent Trip			
	Vancouver *(n=63)*	**Calgary** *(n=26*)*	**Toronto** *(n=81)*	**Montreal** *(n=49*)*
British Columbia	*100%*	57%	44%	50%
Alberta	27%	*100%*	20%	18%
Saskatchewan	12%	17%	11%	11%
Manitoba	7%	9%	7%	7%
Ontario	60%	55%	*100%*	74%
Quebec	37%	37%	44%	*100%*
New Brunswick	6%	7%	5%	7%
Nova Scotia	1%	16%	9%	7%
Prince Edward Island	6%	10%	6%	9%
Newfoundland & Labrador	11%	6%	12%	5%
Yukon	5%	9%	4%	8%
Northwest Territories	4%	15%	6%	5%
Nunavut	3%	3%	3%	2%

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada
F17. Which of the following Canadian provinces or territories did you visit on this trip? (Select all that apply)
*Small base size, interpret with caution (n<50)

South Korea GTRP – December 2024   70

THANK YOU

For any questions, please reach out to research@destinationcanada.com

DESTINATION CANADA

CANADIAN TOURISM DATA collective